

## Planning Guide Format

Questions 1-7 should be completed as you begin to plan the project

Questions 8-10 should be completed after you finish the project

### **Initial CPG**

1. **Primary Purpose**

The primary purpose of this project is

(This statement should be brief. The project should have only one primary purpose.

Example: To raise funds for the chapter. No “and”)

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.**

Write a paragraph describing the project and its background. This should include what the project involves and/or information on the community organization that the project benefits.

List at least 3 specific goals to be accomplished by this project.

The goal that most directly relates to the primary purpose should be listed first.

If the project is a fundraiser for the chapter or a community fundraiser the first goal should be the amount you expect to raise. “To raise \$x for the chapter/community organization”

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

Chairperson:    Name  
                         Address  
                         Phone #  
                         Email

Duties:

Committee Members:    Name  
                                 Address  
                                 Phone #  
                                 Email

Duties: List specific assignments.

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

List all the materials, supplies and resources that will be necessary to implement the project. Resources include individuals and businesses that are necessary to the project. Include items such as planning calendar, chapter newsletter, letterhead, anything that you'll need. If any large items are being contracted out or rented, include the names and addresses of all contacts (such as security, equipment rental).

Organization or person (Include Address & Phone #)	Material/Resource
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5. **Problems and Solutions**

List at least 3 problems/solutions. Think about what could possibly go wrong, and what you would do to prevent it or deal with it if you can't control it.

Problem:  
Solution:

Common problems to address:

Low attendance - discuss how you will advertise project and if the number of attendees/volunteers will impact how or if the project will run.

Weather - if outdoor event, discuss cancellation/reschedule options, and how close to event this decision will be made.

6. **Complete a proposed budget showing anticipated income and expense.  
Upon completion of the project, complete the actual section of the financial statement.**

7. **List the specific steps needed to bring this project to a successful conclusion.**

dd/mm/year	agree to chair project/determine going to hold event
dd/mm/year	complete initial CPG
dd/mm/year	submit article for newsletter
dd/mm/year	contact resource
dd/mm/year	date of event
	Etc.

Questions 8-10: Quarterly Update – If a project runs more than one quarter, you need to complete these questions each quarter as well as when the project is complete

8. **Record any revisions to the original plan.**

dd/mm/year	Explain revision/additional steps
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**9. What changes or recommendations do you have for a future?**

Explain each recommendation in a separate paragraph. This question can highlight things that worked well as well as things that didn't. If you think you know why something didn't work or have suggestions on how to make something work better, include that information as well. Get input from committee members and volunteers as well.

**10. Give specific and measurable results for each goal established. Describe the impact of this project on the chapter, individual members and the community.**

1. Restate goal 1 (from question 2)  
Result:  
(For example: Goal - involve 15 Jaycees. Result: 25 attended)

Do this for each goal.

**Individual impact:** State how you personally benefited by running the project. (i.e., new skills learned; lessons learned)

**Chapter impact:** State how the chapter benefited by running the project.

**Community impact:** State how the community benefited from running the project.

## WHAT IS PROJECT SUBSTANTIATION?

Substantiation is the information which proves that you actually ran your project. It also provides a valuable resource to future chairpersons.

- **Photographs.** Pictures say a thousand words. The chairperson or a committee member should be responsible for taking pictures, getting them developed, and turning them in with the final CPG. The project budget should include a line item for film and developing. Please label your pictures before you turn them in so that appropriate captions can be written for each picture.
- **Sign-in Sheets.** Have all your volunteers and participants sign in at your project. This makes it very easy to record attendance. You will need this information when you write your final CPG and to answer your goals. For large projects, you may want to have sign in sheets for pre-event work.
- **Newspaper clippings and promotional materials.** Clippings can be from any newspaper. Keep the date lines all in one piece. Include press releases, even if an article was not published. Remember, newspaper articles help substantiate your total community attendance. Also include flyers, tickets, brochures, etc.
- **Correspondence.** Letters to persons in the community. A copy of the letter sent and the mailing list of the people contacted is sufficient. Your budget should include a line item for postage. Be sure you are using chapter letterhead for correspondence.