

CPG Training & Project Management

What is a CPG and why do we need to use one?

A CPG is the acronym for Chairman's Planning Guide. It is used in the Jaycee organization for a variety of purposes.

1. Used as a tool to help plan and implement a project or event.
2. Used as a means to approve your plan by the chapter board and membership.
3. Used as a means to appropriate funds from the chapter.
4. Used as a reference for future project chairman.

The three stages of a project

1. Planning – this stage covers all the brainstorming and preliminary work. Draft your preliminary CPG and develop projected budget, timeline, materials and resources you will need and potential problems and solutions. Handle all logistical duties during this stage.
2. Implementation – this is where you run the actual project or event, be it an afternoon, or several weeks (such as a Haunted House).
3. Evaluation – this is the follow up and probably the MOST important part of any project. This is where you realize the goals you set out to do with your project. Be sure to send out thank you notes to supporting businesses and individuals. Prepare your final CPG for approval from your board and membership. Submit PR announcing your accomplishments and what you've done for the community. Submit any charitable donations that were raised.

How To Utilize the CPG

The CPG has ten questions that should be answered in a very detailed manner. Questions 1 – 7 deal primarily with the planning of the project, while questions 8 – 10 deal with evaluating and reviewing the project's success and impact on the chapter and the community. Question 6 deals with the finances of the project and will also have to be completed with actual figures after the project has been run.

Preliminary CPG - During your preliminary CPG drafting, a large portion of the planning process can be guess work, especially if the project has never been run before. At this point, you only need to answer questions 1 – 7, detailing the objective and goals of the project, manpower assignments, materials and resources needed, a proposed budget of incomes and expenditures and a timeline of events and deadlines for the project. Leave questions 8 – 10 unanswered at this time. They will be reviewed after the project is run. Present to your supervising chapter officer for review. Then, present to board and membership for approval.

Final CPG – This is drafted after the project has been run. You will then complete your proposed budget with the actual numbers and evaluate your project's success and impact through questions 8 – 10. Present your final CPG to your supervising chapter officer for review. Then, present to board and membership for approval. Upon full chapter approval, submit to the Illinois Jaycees Service Center. A final CPG must be received by the Service Center within 60 days to receive POC points.

Writing a CPG

To start writing a CPG, you must fill in some rudimentary information. This is located on the top of the CPG, or on a cover page. It includes your chapter's name and number, state's name and number, the project name, CPG Category and Area of Opportunity, Supervising Chapter Officer, chairman's name and info. Illinois is state number 12 and Peoria is chapter number 18.

When filling out this part of the CPG, be sure to use the correct CPG Category and Area of Opportunity along with the corresponding supervising chapter officer. For example, if your chapter is running a beer festival as a chapter fundraiser, the correct CPG Category would be "financial management" and would be supervised under your Chapter Management VP.

The other information that is required should be pretty self-explanatory.

Overview of the Questions on the CPG

1. Primary Purpose

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

The primary purpose will determine the Area of Opportunity and CPG category the project will fall under.

Examples of good primary purposes-

To run a (insert project project here) to raise money for two charities- Charity A and Charity B.

To run (insert project here) to raise money to support chapter operations.

To run a free Easter Egg Hunt for the Enjoyment of the area children.

Examples of poor primary purposes-

To gain public exposure for the chapter by running a highly visible, popular event, Increase Membership and membership participation, to raise money for the Charity XYZ.

To raise money for the March of Dimes and the chapter.

These are all valid purposes but only one of these should included in step 1 of the CPG.

Note: If the project is run to make money, where the majority of the money goes is the primary purpose. If more than 50% of the money goes to charities, you would write – To raise money for Charity ABC and Charity XYZ. If more was returned to chapter, you would write – To raise money for the chapter or another similar reason.

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.

Include the who, what, where, why and how of the project. Give a brief history of the project if applicable This area to be kept to 1 to 2 paragraphs. Explain how this project relates to the chapter's objectives, priorities, and goals as listed in the chapter plan.

The Firecracker 5000 is a 5k run/walk race conducted through the streets of downtown Peoria. This will be the 21st Annual celebration of this race. The race will take place on July 4th at 7:15 a.m. with a registration cost of \$15 in advance and \$20 on the day of the event. Several sub-chairs in areas like manpower, registration, and race refreshments are needed to assist the chairman for this event with at least 600 expected participants. This project is used to raise money for charities and also to support chapter operations.

This project fits in the chapter plan under Priority 2, Community Area of Opportunity, Goal 4: Raise

\$12,000 for various community organizations, Project 4: "Firecracker 5000.

Follow the brief description with a listing of the project goals. Goals should be listed in descending order of importance. Most of the time the primary purpose will relate to the number 1 goal. It is important to make sure the goals are measurable and specific.

Poor examples of goals

- A. To achieve some PR.
- B. To raise some money for Arthritis Foundation.
- C. To involve a lot of Jaycee members.
- D. To recruit some Jaycees.

Better examples

- A. To have Jaycee Pr in four different media outlets.
- B. To raise \$1200 for the Arthritis Foundation
- C. To involve 20 Jaycees
- D. To recruit 2 Jaycees.

3. What are the specific manpower assignments?

Document proposed involvement, both member and nonmember. At a minimum, you will have a minimum of 3 manpower assignments- The President, the Supervising Chapter Officer, and the Chairman. If you have committee members, list their names also. List each individual along with his or her contact information and specific duties and responsibilities. It is best to list duties and responsibilities in chronological order. 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.

Example

Chairman

Toby Quin
1105 Westminster
Washington, IL 61571
H- (309) 444-9304
Cell- (309) 648-6653
E-mail- tobyquin@insightbb.com

Duties:

- A. Write Preliminary CPG
- B. Pass Preliminary CPG by board and membership (if applicable)
- C. Secure sub-chairmen and ensure they fulfill their responsibilities. Approve all decisions of sub-chairmen.
- D. Schedule and chair all committee meetings
- E. Act as a liaison with city, county and state agencies and officials and other related organizations
- F. Arrange place for pre and post race activities
- G. Obtain necessary permits
- H. Write Final Cpg
- I. Pass Final CPG by board and membership (if applicable)
- J. Have Treasurer cut checks and arrange times to deliver them.

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. Make sure to show quantities. List each resource, providing detailed contact information (address, telephone numbers, contact person, e-mails, etc.).

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

Anticipate potential problems and develop backup plans or alternate solutions to each problem.

Example

Problem: Rain occurs (T-ball)

Solutions:

- A) Set up rain line (JAYC hotline) for parents to call to find out if games are canceled or will still be played
- B) Reschedule game for next evening or extend season another week.
- C) Close the dome

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.

Make your best estimate for the following categories and put them in the Preliminary column

Income- There are four areas that should be included in the income.

First list money appropriate from the chapter or money earmarked from other projects. Total with line Called Money appropriated from chapter.

Follow that with a itemized list of donated items. Estimate the value. Total with line called Product Donations.

Next list any cash sponsorships. Total with line called Cash Sponsorships.

Itemize actual project income such as Haunted House admissions. Total with line called Cash Income

- Each of these areas that has more than one item should be totaled. If there are no items then you would put generic titles like Product Sponsors along with \$0.00.

Total these four sections with the title Total Income

Expenses- You will do similar itemized list as Income Area.

List all actual expenses for running the project. You will do similar itemized list as Income Area. You will want to include in-kind donations in this area as well because if we did not have the donated item it would cost money if we had to buy the items ourselves. Total this area called Product Donations. Then have an itemized list of the expenses such as Food, Permits, Construction, Flyers, etc. Total this category with line called Total Cash Expenses. Total these two areas in line called Project Expenses

Net Income- Subtract Project Expenses from Income. This is the project's profit/loss.

If the project made money, you would itemize where the profits go.

Required return to chapter

Dues Subsidy (2.5% net income Haunted House and International Beer Festival)

Liability Insurance (20% Firecracker 5000, 40% Haunted House, 40% International Beer Festival)

Total this area with line called Total Required Return to Chapter.

Earmarks Itemize Profit designed to be spent at a later date. Sometimes this is an estimate. Total this area with line called Total Earmarks

Charitable Contributions- Itemize and total any money designated for charities in line called Total Charitable Contributions

Return to Chapter- Any profit left over will be returned to chapter.

Total all these categories in the line called Total Expenses. This total will be equal to Total

Income

After the project you need to list the actual totals in the column titled Actual.

Simplifying the budget- To make it easier for most people, it is a good idea to combine categories or items. For example, you could combine all food donations in a row called Food Donations instead of listing each one. Or you could list all permit expense in a category called Permits. A more detailed budget should be completed for anyone that wants to delve into budget further and also for next year's chairmen.

See last two pages for example of budget.

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

This step is very important, especially with the larger projects. For each planned step in the project you should include completion dates and frequently start dates. The project chairman (and sub-chairs) can follow the timeline and give greater priority to areas that are behind schedule. The more detail in this area, the better.

Example

January 4, 2001	Present Preliminary CPG to Board for approval
January 18, 2001	Present Preliminary CPG to Membership for approval
Early February, 2001	Begin looking for outlets to promote event
February 22, 2001	Secure location- Confirm with PAL Automotive
Late February	Write article for newsletter
March 16, 2001	Inventory oil and sparkplugs and order any needed supplies from PAL Automotive
	Send out PSA's
	Send out postcards to past customers
March 20, 2001	Send e-mails to roster to get manpower for event
March 26, 2001	Call roster to get manpower for event
March 31, 2001	Run Lawnmower Clinic
April 5, 2001	Present Final CPG to Board for approval
April 19, 2001	Present Final CPG to Membership for approval
Early May	Submit CPG to State for judging
Sometime after event-	Update Mailing list
	Send customers aged 21-39 Jaycee Brochure and invite them to membership meeting

8. Record any revision of the original plan.

Anything that was changed in steps 1- 7 from the original plan should be recorded here. It is important to highlight all modifications so that a clear understanding is provided for future chairman.

Examples- (For the Firecracker 5000)- It was scheduled to be a hot day so we ordered 35 cases of water instead of 30. This insured that we would not run short of water.

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

This might be the most important step in the cpg. In this area, you talk about things that made the project successful and also changes that should be made to make next year's project even better. A good idea is to keep a notebook and right down recommendations as you thank them. Also, for the larger projects, it is a good idea to have a wrap-up meeting. Several ideas will more than likely be identified that you did not think of yourself.

Example of a reason for a project being successful-

Have Kelleher's host the race again. Kelleher's provided a lot more than any hosts have in the past few years and the runners really liked the place.

Example of changes to make the project more successful-

We ran out of bottled water this year due to the heat. Non participants were drinking the bottled water and runners were taking whole bottles of water and dumping it on their heads. There are several ways to remedy this situation. Traditionally, Pepsi has provided 15 cases of bottled water and 25 cases of All Sport. Next year, this should be changed to 20 cases each. If it forecasted to be an especially hot day, 5 additional cases of water should be purchased to avoid any shortfalls. Any excess can always be returned. Other ways to reduce the consumption of water would be to have cups of water available at the finish line. Runners can pour this water on their heads while they are waiting for the stubs to be removed from their bib numbers. In addition, monitors should be placed by the bottled water and allow the runners to take only one bottle at a time and allow only runners and volunteers to drink the bottled water. Spectators can drink the water from the cups.

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

This is an area to really brag on the project and can make the difference between winning awards and losing.

First review the goals. Give a measure of how each goal was satisfied.

- A. To raise a minimum of \$1500.00 for Mental Health Association of Illinois Valley. 80% satisfied. Due to less than anticipated income, we raised only \$1200.00 for this charity. This is still a significant amount.
- B. To have, at least, forty (40) Peoria Jaycees work on the successful completion of this project. 107% satisfied. At least 43 Jaycees assisted this project.

Second, describe the impact of the project in the three areas.

For the individual- include items such as personal skills developed, networking opportunities, training experience, Exposure to members of problems/issues affecting community

For the community- Number of members of the community that attended, number of organizations that benefited from the project, money raised for charity, number of canned goods donated, etc.

For the chapter- number of members in attendance, number of Jaycees activated, number of Jaycees recruited, amount raised for chapter, PR

Individual- This project had a favorable impact on the individual members of the chapter. The project chairmen gained a lot of project management skills and had the opportunity to improve their public speaking ability. The sub-chairs gained some valuable experience and several have proven themselves capable of handling more responsibility.

Impact on the Chapter- This project had a very significant impact on the chapter. Forty Jaycees sweated for several while raising \$1790.10 to help with operational expenses and other Jaycee projects. In addition, 3 people were activated. 1 person was recruited and we and we received a lot of PR. We had 100 radio spots, 100 TV spots and appeared in the newspaper twice and two TV news organizations had features on the event on their evening news.

Impact on the Community- This project is designated as a community development project. It definitely succeeded in this endeavor. \$1200 was raised for the Mental Health Association of Illinois Valley. This organization lost \$200,000 in State budget cuts. This money will help soften the blow a little bit. 2 "special" individuals will have the opportunity to improve the quality of their lives by attending camp for a week. In addition, we provided the opportunity for nearly 600 individuals to enjoy a July 4th morning.

Good Example of a CPG

The 2002 Firecracker 5000 cpg and budget is a good example of how to write a cpg. You can download the cpg and budget at <http://www.jaycees.com> in the Archives section.

Detailed Ledger of Activity

You will want to detail all the expenses and when they were paid. If anyone has a questions regrading an expense, you can always refer to this ledger.

Submitting Your CPG For Recognition

Once the project has been run, and the final CPG has been written and approved by your chapter, a copy will be sent to the Illinois Jaycees Service Center. Parade of Chapters points can be awarded provided the CPG is received within 60 days of the last day the project was run. The CPG can go on to possibly win Region and State quarterly awards.

To receive year-end recognition, you will need to submit an SPE (single project entry). This is primarily your completed, final CPG enclosed in a binder of sorts. You also need to include any and all documentation, such as a completed and detailed financial statement of the project, receipts, correspondence letters, any PR, newspaper stories and ads, committee meeting minutes or notes and photos. These are due at the end of the current year.

Regardless of whether you submit a SPE, you will want to retain all documentation for next year's chairman. This will allow them to concentrate on improving the project instead of recreating everything. It is also advantageous to submit al electronic documentation to be included in the Jaycee CD-ROM Yearly Update. This is distributed to any Jaycee member who requests it.

Promoting Your Project

Many project suffer from under promotion. Utilize your chapter's newsletter and/or website to promote your event or to solicit manpower. Also take advantage of the Illinois Jaycees newsletter, *Illinois Jaycees Pride*, to help create exposure. Invite state officers, region officers and dignitaries from you community to your event, either through e-mail, snail mail or a simple phone call. Contact local media to help advertise the event; many media outlets usually have a "community calendar" of sorts that is completely free.

Remember, no one's going to attend your event if they don't know about it.

Choosing the correct CPG category/Area of Opportunity

Determining which category your project falls under is very important. Question #1 on the Chairman's Planning Guide (CPG), the primary purpose, will determine the category. A wrong classification could cost you an award or POC points. There are 4 different Areas of Opportunities, each with different "pinnacle" areas to where your project classification will fall under. The most likely Supervising Chapter Officer(s) is included along with some examples that fall under each Commission.

The 4 Areas of Opportunities are:

Business Area of Opportunity	<u>Supervising Chapter Officer</u>
Commissions: Marketing and Public Relations	Management
Parades, Media, Business After Hours, Newsletters, Training in these two areas	Management
Strategic Planning	Management
CPG's, Blue Chip, Planning, record keeping, training in these areas	Management
Financial Management	Management
Ways and Means projects, Taxes, Insurance	Management
Business Opportunities	Management
Chamber of Commerce, Starting a Small Business, Entrepreneurship	Management
Individual Area of Opportunity	
Commissions: Personal Development	Individual
Ballroom Dancing, Resume Writing, Vocational Skills, Learning to Cook, Time Management, Write Up, Speak Up	Management
Professional Development	Management
Leadership Training, Super 7, Officer Training, How to Motivate Others	Membership
Membership Retention, Growth, and New Chapters	Membership
Orientation, Retention, Activation, New Member Orientation, Springboard, Degrees, Extensions, M-nights	Management, Member
Chapter Activities	Management, Member
Socials, Sports, Happy Hours, Meetings, Christmas Party, Awards	
Community Area of Opportunity	
Commissions: Community Service	Community
Adopt a Highway, Canned Food Drives, Blood Drives	Community
Community Fundraising	Community
Telethons, Financial Projects where > 50% goes to charity	Community
Government and Civic Involvement	Community
Government Meeting, Voter Registration, Advocacy issues	Community
Children and Youth	Community
Haunted House Kid's Day, Adopt a School, Easter Egg Hunt, Special Olympics	
International Area of Opportunity	
Commissions: State, National. & International Junior Chamber Involvement	Various
GA's, Camp New Hope, Outstanding Young Farmers, Visitations	Various
International Involvement	Various
Twinning, International Speakers, Food Drives for other Countries	

*Membership **recruitment** activities would be included in all Areas of Opportunity. It is expected that when chapters set goals in each opportunity area, membership goals will be included in each area as well".*

CPG/Project Timeline and Procedural Steps

Planning Stage

- Step 1.** Idea for new project and decision to run that project or decision to run an existing project.
- Step 2.** Project chairperson should contact supervising chapter officer to inform intent to run project. Supervising chapter officer should then assist project chairperson in the preparation of the preliminary CPG. This would include reviewing previous CPGs as a blueprint, reviewing the chapter's annual budget to begin developing a budget for the project, deciding manpower assignments, duties, etc. Begin any logistical work if needed. Chairperson should start to recruit sub-chairs if needed.
- Step 3.** Once CPG is written, supervising chapter officer should closely review it before it is submitted to the board. Highlight and make changes to CPG if needed.
- Step 4.** Project chairperson and supervising chapter officer submit CPG for board approval.
- Step 5.** Project chairperson and supervising chapter officer submit CPG for membership approval.
- Step 6.** Continue any planning and preparations as needed. Remember to promote as much as possible. Make reminder calls/e-mails to manpower. Call vendors and sponsors to make sure they are coming through with their responsibilities. Keep notes of all changes made to the CPG and other important details and retain all important documents. Note-all correspondence (press releases, donation letters, flyers, etc.) must be reviewed and approved by the supervisor chapter officer or president before distribution.
- Step 7.** Board and membership should be given periodic updates on the status of the project.

Implementation

- Step 8.** Run Project. Project chairperson should delegate responsibilities so that he/she can be available to deal with any problems or concerns that may arise. Also allows project chairperson easily available to others to answer any questions they may have.

Evaluation

- Step 9.** Follow up work begins. Tally all receipts and expenditures of project. Requests for reimbursements should be submitted on the approved form to the treasurer along with the receipts within 15 days of the projects completion, unless other arrangements are made in advance with the Treasurer. Cash and checks should be given to the treasure to deposit. Solicit feedback from membership on how the project was run and recommendations on improving the project.
- Step 10.** Send thank you notes to supporting businesses and members and non-members who helped out within 21 days of project completion. Tip: also include how this project impacted the community and your chapter. It will make them feel a lot better that their involvement made a big difference.
- Step 11.** Begin work on final CPG. Allow supervising chapter officer to review the CPG before it is presented to the board. Adjust budget and make corrections if needed. Supervising chapter officer should review annual chapter's budget to make sure enough funds are being returned to chapter
- Step 12.** Project chairperson and supervising chapter officer present final CPG to board for approval. **IT IS IMPORTANT TO NOT TELL CHARITIES HOW MUCH MONEY THEY WILL RECEIVING UNTIL THE CPG HAS PASSED THE BOARD AND MEMBERSHIP.**
- Step 13.** Project chairperson and supervising chapter officer present final CPG to membership for approval.
- Step 14.** Have treasurer cut checks for any charitable contributions from the project. Submit press release to local media regarding the success of project and the impact to the community. Board should file final CPG and submit a copy to the Illinois Jaycees Service Center. Electronic copies of the CPG and other pertinent documents should be sent to the archive director along with anything else related to the project.

2002 Firecracker 5000

				2002 Proposed	2002 Actual
Income					
Appropriation from Chapter					
				\$0.00	\$0.00
Location Sponsor (Kelleher's)					
				\$500.00	\$1,000.00
Food Sponsors*					
				\$1,500.00	\$1,500.00
Maui Jim (4 gift packs- sunglasses, hat, t-shirt)					
				\$0.00	\$1,200.00
Radio Sponsorship (Big oldies)					
				\$500.00	\$500.00
3000 Race Flyers (Marquette Group)					
				\$0.00	\$400.00
Other Supplies*					
				\$75.00	\$150.00
Total Product Donations				\$2,575.00	\$4,750.00
Marquette Group					
				\$300.00	\$300.00
Brewer's Distributing					
				\$300.00	\$300.00
\$30 Gift Certificate (Kroger's)					
				\$0.00	\$30.00
Total Cash Sponsorships				\$600.00	\$630.00
		Prop	Act		
Pre-Registration	\$15 per	400	424	\$6,000.00	\$6,315.00
Day-of Registration	\$20 per	250	165	\$5,000.00	\$3,280.00
T-shirt Sales					
				\$0.00	\$50.00
Total Cash Income				\$11,000.00	\$9,645.00
Total Income				\$14,175.00	\$15,025.00
Expenses					
Trophies and Plaques					
				\$800.00	\$740.13
T-shirts					
				\$3,750.00	\$4,162.94
Finish Line	\$1 per entrant			\$650.00	\$591.00
Permit					
				\$50.00	\$50.00
Postage					
				\$150.00	\$134.40
Bid Numbers and Safety Pins					
				\$225.00	\$287.57
Van Rental					
				\$50.00	\$0.00
Appreciation Party					
				\$300.00	\$0.00
Misc Supplies (Copies,Cups,Ice,etc.)					
				\$300.00	\$126.88
Beer and Food					
				\$500.00	\$283.88
Jaycee PR for Packets					
				\$250.00	\$58.10
Total Cash Expenses				\$7,025.00	\$6,434.90
Total Project Expenses				\$9,600.00	\$11,184.90
---- Net Income ----				\$4,575.00	\$3,840.10
Required Return to Chapter					
Dues Subsidy (2.5% of Net Income HH and IBF)					
				\$0.00	\$0.00

Liability Insurance (20% F5000, 40% HH, 40% IBF)	\$500.00	\$500.00
Total RRTC	\$500.00	\$500.00
Earmarks		
Building Fund	\$500.00	\$400.00
Total Earmarks	\$500.00	\$400.00
Charitable Contributions from Project		
Mental Health Association of I.V.	\$1,500.00	\$1,200.00
Camp New Hope	\$900.00	\$800.00
Total Charitable Contributions	\$2,400.00	\$2,000.00
Return to Chapter	\$1,175.00	\$940.10
Total Expenses	\$14,175.00	\$15,025.00