

The Lindenhurst /Lake Villa Jaycees
Chairman's Planning Guide

Chapter Name LLV	Chapter #	State Name Illinois	State # 12
Chairman's Name, Address and Phone #: Kevin Burkert 2408 S.E. Thornwood Lindenhurst, IL 60046		Project Name Tax Seminar 2004	
Cell # 847-245-8799		CPG Category ID	
E-Mail Address bigkev@arczip.com		Supervising Chapter Officer Mike Bellek	

PLANNING

1. Primary purpose.

The primary purpose of this project is to educate Jaycees in personal income tax planning and preparation.

2. Give a brief description of the proposed project and background information.

This project will be a "hands on" workshop to aid participants in preparing and completing their 2004 federal and state personal income tax returns. A brief tax planning presentation will also be given to those participating. The seminar will be held before the General Membership meeting.

The Goals of this project are:

Goal 1: To involve 5 Jaycees in the project.

Goal 2: To inform participants of tax preparation procedures and tax planning/saving techniques.

Goal 3: To involve two region board members

3. What are the specific manpower assignments?

Kevin Burkert
2408 S.E. Thornwood
Lindenhurst, IL 60046

Prepare, copy and complete CPG; present CPG to Board for approval; Lead the seminar and Promote project at GM

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

<u>Material or Supply & Quantity</u>	<u>Member Responsible for Getting</u>	<u>Date Needed</u>	<u>Is Resource Donated, Owned or Purchased</u>	<u>Cost</u>
Membership roster	Mike Bellek	2-04	Owned	None
Sign-up sheets	Mike Bellek	2-10-04	Donated	None
Sign-in sheets	Cherie Finalyson	2/04	Donated	None
CPG form/copies	Niki Warden	2/04	Owned/Donated	None
Tax information	Kevin Burkert	2/04	Owned	None
Meeting Room	Mark Federman	2/04	Donated	None
Tax Professional	Kevin Burkert	2/04	Donated	None
Flyers for other events	Mike Bellek	3-17-04	Owned	None

Supplier's Names and Addresses:

Name: Lindenhurst Civic Club
Address: 1950 Old Elm Rd
Phone: 847-265-9272
What: Location of seminar

Name: Kevin Burkert
Phone: 847-245-8799
What: Instructor for Seminar

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

Problem: Low attendance at scheduled project.
Solution: Inform members about project at two General Membership meetings.

Problem: Some members may not have their federal and state tax forms.
Solution: Have extra forms available for each participant.

Problem: Some members may be too shy to ask tax questions in front of the group.
Solution: Provide one-on-one assistance when needed.

6. Complete a proposed budget indicating all anticipated income and expense.

	<u>Proposed</u>
INCOME:	
Appropriation from Chapter	\$ 0.00
Value of Donated Items (list them):	
Sign-in sheets	.50
Sign-up sheets	.50
CPG copies	2.00
Tax Forms	0.00
TOTAL:	<u>\$ 3.00</u>
EXPENSES:	
Value of Donated Items (list them):	
Sign-in sheets	\$ 0.50
Sign-up sheets	0.50
CPG copies	2.00
Tax Forms	0.00
Other Expenses (list them):	
TOTAL:	<u>\$ 3.00</u>

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

<u>Date:</u>	<u>Step:</u>
1/04	Agreed to chair the project at the January GM and promoted that evening.
1/04	Mark Federman to reserve meeting space for project.
1/04 2/04	Advertise project on Regional Update and via e-mail
1/04	Gather tax information for project
2/4/04	Project date.
3/3/04	Project wrap-up at general membership meeting.
3/04	Complete CPG

IMPLEMENTATION AND EVALUATION

8. Record any revision to the original plan.

We made the decision that we would not go over anyone's tax returns due to time restraints.

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

I would recommend to a future chairperson to implement a time to do the actual "work shop" phase of the project. That seems to be where the participants needed the most work. I was able to help answer questions but not look at actual returns. Maybe briefly present tax saving procedures and tax law changes and still use "hand out" reference material. We had a 40 minute workshop this year, maybe allocate at least a half hour at the next tax seminar. Be sure to enforce a "cut-off time." Then allow the final time to go over part returns if participants have them. Be sure to provide copies of all the basic returns and tax tables, along with a few calculators.

Although we did have 2 region chapters attend, I highly suggest making visitations to other chapters and invite to attend.

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

Goal 1: To involve 5 Jaycees in the project

Result: 5 Jaycees attended the tax seminar, achieving 100% of the stated goal.

Goal 2: To inform participants of tax preparation procedures and tax planning/saving techniques.

Result: Participants were informed of tax preparation procedures and tax planning/saving techniques in a 40 minute presentation that included hand outs.

Goal 3: To involve 2 region Board Members

Result: Goal Exceeded! Three region board members participated in the project.

Chapter Impact:

This project had a positive impact on the chapter by providing free seminar on a subject that everyone has to deal with during the winter months, taxes. The seminar was open to all chapter members and guests.

Individual Impact:

Individual project participants are better informed of tax law changes, tax planning ideas, and tax preparation procedures

Community Impact:

The seminar had a positive impact on the community when guests were made aware of the running of this project at the general membership meetings and through the distribution of the regional weekly update. By providing individual development projects such as the tax seminar, Jaycee membership is attractive, and more Jaycee membership means more leadership development through community service, which has a positive effect on our community.

Tax Seminar Financial Statement

	<u>Proposed</u>	<u>Actual</u>
INCOME:		
Appropriation from Chapter	\$ 0.00	\$0.00
Value of Donated Items (list them):		
Sign-in sheets	50	50
Sign-up sheets	50	50
CPG copies	2.00	2.00
 TOTAL:	 <u>\$ 3.00</u>	 <u>\$ 3.00</u>
EXPENSES:		
Value of Donated Items (list them):		
Sign-in sheets	\$ 0.50	\$ 0.50
Sign-up sheets	0.50	0.50
CPG copies	2.00	2.00
 Other Expenses (list them):		
Copying of handouts	0.00	29.39
 TOTAL:	 <u>\$ 3.00</u>	 <u>32.39</u>