



## Facilitator's Guide

# Developing and Implementing an Action Plan for Community Organizations

## *Giving New Direction to Established Organizations*

*Vision without action is a daydream.*

*Action without vision is a nightmare. —Japanese proverb*

### Rationale:

A clear plan is necessary for your organization to move toward achieving its objectives. A group that doesn't have an action plan is like a ship that hoists its sail and lets the winds blow it wherever it may land; the ship is not likely to reach its intended harbor.

What, specifically, is the role of the 4-H organization in the community? What are the needs of the community? What is the role of the 4-H organization in addressing or serving the needs of the community?

If you are in a new leadership role with your 4-H organization, utilize this process to develop a focus or purpose. For established volunteers and leaders, review this process and see which topics you've missed or perhaps haven't addressed in a while. Remember—to build an effective 4-H organization and to keep an effective 4-H organization going, you need to plan for the future.

### Program Goal:

To develop and implement an action plan that will inspire and set in motion the actions needed to accomplish the 4-H organization's vision.

### Program Objectives:

- Renew focus on the goals of the 4-H organization
- Develop SMART goals and objectives to accomplish the purpose of the 4-H organization
- Develop an effective action plan to aid in achieving the goals of the 4-H organization

**Note:** This process will take longer than a one-hour meeting. After Objective 1 is completed, up to eight hours of retreat time may be needed to fully develop goals, objectives and an action plan for the 4-H organization.

### Pre-Program Preparation/Materials:

Read fact sheet *Developing and Implementing an Action Plan for Community Organizations* (CLD2-6).

#### After completing Objective 1:

- Secure a meeting facilitator.
- Work with the facilitator to determine “the question” (refer to CLD2-6 fact sheet).
- Assemble the team and get participants' commitment to serve on the team (refer to CLD2-6 fact sheet). The team should include some members of your 4-H Council serving in leadership roles, 4-H Council members and volunteers who are not serving in leadership roles, parents, 4-H members, community partners and stakeholders, elected officials, educators, representatives of law enforcement, clergy, social services, etc.
- Print copies of the organization's core values, vision and mission statements for each team member (<http://www.4-h.org>).
- Make copies of 4-H newsletters from the previous two years to reference programs and activities.

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This leadership curriculum was developed by 4-H Youth Development agents with University of Kentucky specialists. Examples in the guide are geared toward an 4-H audience. This guide may be reproduced or modified for educational or training purposes and used with other audiences.

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- Have recent completed volunteer and leader interest inventories available for reference.
- Determine planning meeting logistics, including location, meals, refreshments and breaks.
- Collect the necessary audio-visual equipment (if needed), materials, and supplies. Supply paper and pencil for each person. Flip chart and flip chart markers are helpful.
- Copy the *Goals, Objectives and Action Steps* handout, *Action Plan Worksheet*, *Committee Plans*, and the *Organizational Needs Assessment Discussion Guide* for each team member.
- Send meeting details to the team, including “the question” (refer to fact sheet).

## Introduction:

Most 4-H councils would benefit from renewing their focus or purpose. This renewal determines the 4-H organization’s specific role in the community. Developing an action plan is a vital first step in providing direction for an organization and its programs. An action plan mobilizes an organization to take action to achieve its purpose. Implementing the action plan will keep the organization focused and will increase the likelihood that goals will be accomplished because of increased involvement of its members. There are several steps involved in preparing for, developing and implementing an action plan for the organization.

### Introductory Activity:

**Ask:** “What do you think is the role of the 4-H Council in the community?” List the answers on a flip chart, white board or screen. In addition, make (or keep) notes of the responses.

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## Objective 1: To renew focus on the goals of the organization

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Pose the following scenario for discussion:

*A new 4-H Council president has recently been installed. This provides a good time to review and renew the focus of the council.*

Ask the following questions of the council and capture the group’s responses, answers and suggestions:

- What community partners could help the 4-H Council develop an action plan that will provide new direction and renew the focus of the county 4-H program?
- Where should we hold a meeting or retreat to discuss and develop a plan of work for this organization?

- What is a good environment that will keep interest high over a period of several hours?
- Who would be the best facilitator for a retreat?
- What is the “right” question for our organization to consider?

**Note:** See “Focusing on ‘The Question’ for the Team’s Planning Meeting” section of the fact sheet for ideas.

Using the ideas generated in the discussion, assemble the planning team, determine the location for a working retreat and make necessary plans.

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## Objective 2: To develop SMART goals and objectives to accomplish the purpose of the organization

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Before you begin making decisions, discuss what process will be used to make those decisions. Will you decide by majority vote or by consensus? How will you make sure everyone has equal opportunity to give input? How will you promote team unity in the absence of a unanimous opinion?

You may have heard the expression, “We’d better pay attention to the future, because that’s where we’re going to spend the rest of our lives.” The foundation for success in any organization is a clear picture of where the organization is going. Goals help the organization achieve its mission and vision.

If goals have not been previously established, this is the time to develop goals. Goals are broad, over-arching statements that provide focus and direction and give meaning to the organization and its programs. (See *Developing a Vision for Your Organization* [CLD2-2].)

“SMART” is an acronym for “Specific, Measurable, Action-oriented, Realistic and Time-sensitive.” The most effective objectives, goals and action steps are those that include each of the five components of “SMART” goals in the statement.

## Brainstorming the Basics

**Activity:** Review the vision and mission of the organization. For example, the 4-H mission reads:

“4-H empowers youth to reach their full potential, working and learning in partnership with caring adults.”

Give each team member blank sheets of paper. Have participants write each part of the organization’s mission and/or vision on each sheet of paper (for example “empowers youth to reach their full potential”). Beneath each title make two columns—one for “reality” and one for “dream.” If a flip chart and markers are available, the facilitator can do this as an example.

Fill in the “reality” columns first, writing down the activities that are already in place that fit that portion. You may want to utilize past newsletters to review recent activities. Discuss any gaps you see, then brainstorm together and record “dreams” for the organization. Don’t be afraid to dream big, and don’t dismiss any ideas that are generated at this point.

Utilizing *Organizational Needs Assessment Discussion Guide* (CLD2-4-FCS), discuss current youth development issues, needs or concerns that the county 4-H program could address. See *Generating Members, Volunteers and Leaders in Community Organizations* [CLD2-4].)

Using the ideas generated in the dreams exercise and *Organizational Needs Assessment Discussion Guide*, determine goals.

### **Examples of Well-Written Goals:**

The Jasper County 4-H Council will increase county 4-H membership by adding: one new member to each club by the end of the program year by conducting a countywide membership drive and a marketing campaign.

- Expand its outreach in the community by adding two high school students and one home school student as voting members.
- Expand the educational and leadership base of its membership by devoting at least 15 minutes at each council meeting to leadership development education, utilizing the KELD curriculum.
- Contribute to youth fitness by hosting a fitness booth at the county fall festival.

Using the goals, develop objectives for each goal. Objectives are the individual strategies necessary to accomplish the goals. Objectives are the “sub-goals” of the organization’s mission and vision.

Be careful to write each objective in a SMART format (specific, measurable, action-oriented, realistic, time sensitive—refer to fact sheet). Complete the goals and objectives portion only of handout 1, *Goals, Objectives and Action Steps*.

### **Examples of Well-Written Objectives:**

- The Jasper County 4-H Council will conduct a series of fundraising activities (hosting a spaghetti dinner, selling poinsettias, staffing the concession booth at the county fair) to be held throughout the community, which will be completed by December 20 and will raise at least \$5,000 for scholarships.
- Add a new 4-H club by August 31 in a geographic area in which 4-H is not currently present.

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## **Objective 3: To develop an effective action plan to aid in achieving the goals of the organization**

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Action steps are the nuts and bolts of planning.

The real key to success is action. Vision alone does not ensure success. Even the most comprehensive plan will not be successful without action steps and measurement. Without action steps, time frames and accountability or measurement, the process is just a mental exercise that is meaningless or a waste of time and energy.

Have you ever tried to run a race when you don’t know where the finish line is located? That’s the same thing as establishing a goal, without having a completion date for it. Establish the deadline in writing. This helps to make the deadline definitive; it establishes that there is, in fact, a deadline, and that the deadline is real.

Objectives can be further broken down into smaller action steps. Each person in the organization should accept responsibility for completing one or more action steps. This is their contribution to the organization and their commitment to the mission of the organization. Achieving the action plan will move the organization forward and closer to accomplishing its vision and mission.

Complete handout 2 *Planning and Reporting Schedule*. Using your newly created goals and objectives, determine the date of the subsequent events and activities. Use the chart to do some backward planning so you will know when programs/projects need to begin.

Finish completing the action steps in handout 1, *Goals, Objectives and Action Steps*, using the *Planning and Reporting Schedule* chart as a guide for the project timeline. Determine members to contact to help complete action steps by utilizing completed member interest surveys. (See *Generating Members, Volunteers and Leaders in Community Organizations* [CLD2-4].)

### **Later:**

The completed action plan should be adopted as soon as possible. It should be presented to and adopted by the 4-H Council. Once the action plan has been adopted, the single most important step in the entire process must be taken. (This is the point at which most long-range plans fail.) Specific action must be taken to ensure that the action plan will be implemented and executed. This is most effectively accomplished through committee work.

Complete handout 3, *Committee Plans*, for each planned activity and/or event.

## *Annually:*

Take a look at the big picture of your organization and assess what you've learned so far. Solicit feedback from the 4-H Council and make a list of what's working and what's not working in the organization. Review your successes as well as your challenges, and determine what needs to be revised for the future. Review your "dreams" and "reality" brainstorming lists, and update your vision and goals for the next year.

Measurement is needed for progress and improvement. Success requires constant learning and improvement. There is always something you can learn to help you (and the organization) become more effective. The plan should change as you and the organization gather new information and grow.

Review the plan each year to determine what worked and what did not work and why. Plan action steps to improve and move toward accomplishing the organization's mission and vision.

## **Summary:**

Organizations that are achieving goals and accomplishing their objectives have an easier time generating, educating, mobilizing and sustaining members, volunteers and leaders because the public can see that they're making a difference in the community. Creating and implementing an action plan will re-energize members, volunteers and leaders, and breathe new life into the 4-H Council.

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Adapted by: Ken Culp, III, Principal Specialist for Volunteerism, Department of 4-H Youth Development and Adjunct Associate Professor, Department of Family Sciences; Christy Eastwood, Boone County Extension Agent, 4-H Youth Development; and Susan Turner, Monroe County Extension Agent, 4-H Youth Development, from original materials developed by: Rosie Allen, Gallatin County Extension Agent, FCS; Laura F. Stephenson, Kentucky Extension Program Leader; and Ken Culp, III - Principal Specialist for Volunteerism, 4-H Youth Development & Adjunct Associate Professor, Family Sciences

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# Goals, Objectives and Action Steps

**Goal A:** \_\_\_\_\_

**Objective 1:** \_\_\_\_\_

Action Step 1: \_\_\_\_\_

Action Step 2: \_\_\_\_\_

Action Step 3: \_\_\_\_\_

**Objective 2:** \_\_\_\_\_

Action Step 1: \_\_\_\_\_

Action Step 2: \_\_\_\_\_

Action Step 3: \_\_\_\_\_

**Objective 3:** \_\_\_\_\_

Action Step 1: \_\_\_\_\_

Action Step 2: \_\_\_\_\_

Action Step 3: \_\_\_\_\_

**Objective 4:** \_\_\_\_\_

Action Step 1: \_\_\_\_\_

Action Step 2: \_\_\_\_\_

Action Step 3: \_\_\_\_\_

**Note:** Objectives must be S.M.A.R.T.! (Specific, Measurable, Action oriented, Realistic, Time sensitive—refer to fact sheet)

**Poor goal:** Increase membership next year.

**Good goal:** Add 10 new members by December KEHA membership report deadline.

**Great goal:** Add 10 new members by December KEHA membership report deadline, all of whom live in geographical areas in which the membership has no representation.



**ACTION PLANNING AND REPORTING SCHEDULE FOR \_\_\_\_\_**

**ORGANIZATION / CLUB / COUNCIL \_\_\_\_\_**

<p><b>Month</b></p>	<p><b>State the ACTIVITY to the right of the month in which it is to be held</b></p>	<p><b>Present Plans</b> (State the activity to the right of the month in which <b>PLANS</b> are to be presented to the members at a meeting)</p>	<p><b>Report Accomplishments</b> (State the activity to the right of the month in which <b>ACCOMPLISHMENTS</b> are to be <b>REPORTED</b> to the members at a meeting)</p>
July			
August			
September			
October			
November			
December			
January			
February			
March			
April			
May			
June			



*Committee Plans*

**Committee for:** \_\_\_\_\_ **Chairperson:** \_\_\_\_\_

**Committee members:** \_\_\_\_\_

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Statement of Activity	Goals / Objectives	Responsibility and Procedures	Accomplishments



# Organizational Needs Assessment Discussion Guide

—Example—

## *Current priority community problem, need or issue:*

**Example:** Obesity. Youth don't eat enough fruits and vegetables and include too much fat and too many calories in their diets. Additionally, youth do not engage in enough physical activity.

## *What is our organization's mission?*

**Example:** One of the four primary components of 4-H is "health." Improving the physical health and fitness of youth is a primary focus of the Kentucky 4-H program. 4-H programs are designed to develop youth potential and improve four-fold youth development (cognitive, social, emotional and physical) in Kentucky communities. Volunteers play a key role in delivering these programs, events and activities. Across the state, county extension agents for 4-H Youth Development work closely with volunteers to provide educational programming and coordinate community activities.

## *Is our mission relevant to this community issue?*

**Example:** Yes. Learning about nutrition, health, physical activity and making healthy choices is an important component of 4-H programs, projects, events and activities.

## *If the issue is relevant to our mission, how will our organization respond to this issue?*

**Example:** Jasper County 4-H could sponsor a youth cooking school utilizing products from the local farmers market.

## *What do we hope to accomplish through the efforts of our members, volunteers and leaders? Do we need to recruit members, volunteers or leaders to accomplish our goal?*

**Example:** Jasper County 4-H can focus the cooking school on incorporating fresh fruits and vegetables with entrees, sides, salads and desserts using a quick menu approach; perhaps invite a local chef and farmers market members to also participate in live demonstrations and invite the general public to the school; utilize Kentucky Proud products and "Plate it Up" recipes; focus on getting young families to attend.

## *In what ways can we increase the involvement and participation of members, volunteers or leaders in our organization to accomplish our response goal?*

**Example:** Jasper County 4-H needs more volunteers! We need a cooking school planning committee and a chairman (perhaps use the Extension Homemaker club foods and nutrition chairs and other interested members). Recruit members to volunteer for marketing the event, recruit volunteers to work with farmers market producers to obtain donations of fresh produce. Ask the FCS Agent to assist in identifying and providing "Plate it Up" recipes that would highlight local produce and be easy for 4-H members to prepare and enjoy.





# Organizational Needs Assessment Discussion Guide

*Current priority community problem, need or issue:*

*What is our organization's mission?*

*Is our mission relevant to this community issue?*

*If the issue is relevant to our mission, how will our organization respond to this issue?*

*What do we hope to accomplish through the efforts of our members, volunteers and leaders?  
Do we need to recruit members, volunteers or leaders to accomplish our goal?*

*In what ways can we increase the involvement and participation of members, volunteers or leaders in our organization to accomplish our response goal?*