

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 organization in the community? What are the needs of the community? What is the role of the organization in addressing or serving the needs of the community?

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

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 organization.*

Program Goal:

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

Program Objectives:

- To renew focus on the goals of the organization.
- To develop SMART goals and objectives to accomplish the purpose of the organization.
- To develop an effective action plan to aid in achieving the goals of the organization.

NOTE: *Two working sessions may be necessary to accomplish Objective 3.*

Pre-Program Preparation/Materials:

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

After completing Objective 1:

- Secure a meeting facilitator.
- Work with the facilitator to determine “the question” (refer to fact sheet).
- Assemble the team and get their commitment to serve on the team (refer to fact sheet). The team should include some members of your organization that are in leadership roles and some team members that are not in leadership roles.
- Print copies for each team member of the organization's core values, vision, and mission statements.
- Have the most recent year (and previous two years if possible) of organization newsletters available to reference past programs and activities.
- Have recent completed member interest surveys if available.
- 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 would be helpful.

This leadership curriculum was developed by Agriculture and Natural Resources (ANR) agents along with University of Kentucky specialists. Therefore, the examples used in the facilitator's guides are geared toward an ANR/Horticulture audience, such as Master Gardener groups. Please feel free to modify and reproduce the facilitator's guide for any appropriate educational or training purposes with other audiences.

- Copy the *Goals, Objectives and Action Steps* handout; *Action Plan Worksheet*; *Committee Plans*; and *Organizational Needs Assessment Discussion Guide* for each team member.
- Send meeting details to the team, including “the question” (refer to fact sheet).

Introduction:

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

Introductory Activity:

Ask: *What do you think is the role of our organization in our community?* If a flip chart is available, list answers on a flip chart for all to see. Otherwise, make notes of the responses.

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

Discuss the following scenario:

A new president has recently been installed in our Master Gardener Association. This is a good time to renew focus on the organization.

Ask the following questions of the group and take notes on the answers and suggestions:

- What community partners could help the Master Gardener Association develop an action plan that will provide new direction and renew the focus of the county Master Gardener program?
- Where would you have 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?
- What kind of food would you like if you participated in a retreat or meeting?
- 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.
- Make necessary plans.

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

Ice-breaker Activity:

In order for the planning team to be most effective and productive, everyone needs to become comfortable and familiar with all members of the planning team. An example of an icebreaker is “Two Truths and a Lie.” Ask each person to state three things about themselves. Two statements should be true and one should be false. Ask the group to guess which statement is a lie.

Before you begin making decisions, discuss what process you’ll use 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 them. 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).

Brainstorming the Basics:

Review the vision and mission of the organization. For example, the KEMG mission reads:

Kentucky Extension Master Gardener programs educate people, engaging them in learning to use unbiased, research-based horticulture and gardening practices through a network of trained volunteers directed and supported by land-grant university faculty and staff.

Give each team member blank sheets of paper. Write each part of the organization’s mission and/or vision on a sheet of paper, one per sheet. For example, KEMG members may consider using “Learning— Educating—Serving.” Underneath 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 the *Organizational Needs Assessment Discussion Guide* worksheet below, discuss current priority community problems, needs, or issues that your organization could possibly address. Using the ideas generated in the dreams exercise and *Organizational Needs Assessment Discussion Guide*, determine goals.

Examples of Poorly-written Goals:

- The Jasper County Extension Master Gardeners will increase membership.
- The Jasper County Extension Master Gardeners will increase the number of projects they complete by 50 percent.

Examples of Well-written Goals:

- The Jasper County Extension Master Gardeners will help address food insecurity by developing a program that teaches families how to grow their own vegetables in raised beds/containers.
- The Jasper County Extension Master Gardeners will expand its outreach in the community by hosting a booth at the local farmers market twice a month from June to October.
- The Jasper County Extension Master Gardeners will expand the educational and leadership base of its membership by devoting at least 15 minutes at each meeting to leadership development education, utilizing the KELD curriculum.
- The Jasper County Extension Master Gardeners will organize an annual plant sale to raise funds for scholarships.

Using the goals (for example, with KEMG “Learning—Educating—Serving”), 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 *only* the Goals and Objectives portion of handout 1, *Objectives, Goals and Action Steps*.

Examples of Poorly-written Objectives:

- The Jasper County Extension Master Gardeners will conduct a series of fundraising activities that will raise at least \$5,000 for scholarships.
- The Jasper County Extension Master Gardeners will teach a program on how to grow vegetables at no cost to the program participants.

Examples of Well-written Objectives:

- The Jasper County Extension Master Gardeners will conduct a series of fundraising activities (plant sale, organizing a gardening workshop) to be held throughout the community, which will be completed by December 20 and will raise at least \$5,000 for scholarships.
- The Jasper County Extension Master Gardeners will teach a program on how to grow vegetables in containers/raised beds to 10 families in need by May 2020 and will provide all of the materials (plants, containers, soil etc.) at no cost to the program participants.

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

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 and not known where the finish line was located? That’s the same thing as establishing a goal, then not 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 *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 presented to the organization leadership by the meeting planner as soon as possible after its completion. Once the action plan has been adopted by the leadership, 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 with participant buy-in.

Complete *Committee Plans* handout 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 planning team and make a list of what is and isn’t 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 organization.

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ACTION PLANNING AND REPORTING SCHEDULE FOR: _____

ORGANIZATION/CLUB/COUNCIL _____

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

Committee Plans

Committee for: _____ Chairperson: _____

Committee members: _____

Statement of Activity	Goals / Objectives	Responsibility and Procedures	Accomplishments

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). Goals may have fewer or more than four objectives.

Poor goal: Address food insecurity in our community.

Good goal: Address food insecurity in our community by teaching a program on how to grow vegetables in containers/ raised beds to families in need.

Great goal: Address food insecurity in our community by teaching a program on how to grow vegetables in containers/ raised beds to families in need. Contact potential partners by January 30th, Market the program through the local food pantry and school family resource centers to get as many participants as possible.

Organizational Needs Assessment Discussion Guide —Example—

Current priority community problem, need or issue:

Example: Food insecurity. Families in need do not have reliable access to fresh fruits and vegetables. Learning to grow vegetables and/or fruits in containers or raised beds could help those in need.

What is our organization's mission?

Example: Kentucky Extension Master Gardener (KEMG) programs educate people, engaging them in learning to use unbiased, research-based horticulture and gardening practices through a network of trained volunteers directed and supported by land-grant university faculty and staff.

Is our mission relevant to this community issue?

Example: Yes. Educating the community on gardening is part of the Coffee County Extension Master Gardeners mission.

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

Example: Coffee County Extension Master Gardeners could sponsor a class on container/raised bed gardening and provide all materials and plants to participants.

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: Coffee County Extension Master Gardeners can teach the class of participants (youth and adults) how to grow their own vegetables; we need to recruit volunteers and leaders that are currently working with families in need such as volunteers at the local food pantry, family resources centers in the schools, local churches etc.; the county Family and Consumer Sciences Agent could teach a class on cooking with fresh vegetables.

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

Example: Coffee County Extension Master Gardeners need a program planning committee and a chairman. We need to recruit members to volunteer for marketing the event, and to work with local organization to recruit participants.