



## 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.

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:** It will take two working sessions to accomplish Objective 3.

### Pre-Program Preparation/Materials:

- Read "Developing and Implementing an Action Plan for Community Organizations" fact sheet (CDL2-6).

#### 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 in the organization.
- Print copies of the organization's core values, vision and mission statements for each team member.
- 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.

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This leadership curriculum was developed by Family & Consumer Science (FCS) agents with University of Kentucky specialists. Examples in the guide are geared toward an FCS audience such as Kentucky Extension Homemakers. This guide may be reproduced or modified for educational or training purposes and used with other audiences.

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- Copy the *Goals, Objectives and Action Steps* handout; *Action Plan Worksheet*; *Committee Plans*; *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 increases 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 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.

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## Objective 1: Renew focus on the goals of the organization

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Pose the following scenario for discussion:

*Your organization just celebrated the retirement of its leader of 30 years. A new leader has recently been installed. This is a good time to renew focus on the organization.*

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

- Who are big picture thinkers in our community?
- 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 and make necessary plans.

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## Objective 2: Develop SMART goals and objectives to accomplish the purpose of the organization.

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### 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 an 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 “CLD2-2 Developing a Vision for Your Organization”.)

## Brainstorming the Basics

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

The Kentucky Extension Homemakers Association (KEHA) is a volunteer organization that works to improve the quality of life for families and communities through leadership development and education in cooperation with the Kentucky Cooperative Extension Service.

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, KEHA members may consider using “Learning—Leading—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 “Organizational Needs Assessment Discussion Guide” (CLD2-4-FCS) discuss current priority community problems, needs or issues that your organization could possibly 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 Extension Homemakers will increase county 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.
- The Jasper County Extension Homemaker Council will expand its outreach in the community by adding two high school students and one home school student as voting members.
- The Jasper County Extension Homemaker Council will 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.
- The Jasper County Extension Homemaker Council will contribute to health awareness by hosting a health booth at the countywide Fall Festival.

Using the goals (for example, with KEHA “Learning—Leading—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 the Goals and Objectives portion *only* of handout 1, *Objectives, Goals and Action Steps*.

### Examples of Well-written Objectives:

- The Jasper County Extension Homemakers 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 Extension Homemaker Club by the December KEHA membership report deadline which will be in a geographic area in which Extension Homemakers is not currently present.

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### Objective 3: 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 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 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 presented as soon as possible after its completion by the meeting planner to the organization leadership for adoption. 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.

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 planning team 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 organization.

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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>
<p><b>July</b></p>			
<p><b>August</b></p>			
<p><b>September</b></p>			
<p><b>October</b></p>			
<p><b>November</b></p>			
<p><b>December</b></p>			
<p><b>January</b></p>			
<p><b>February</b></p>			
<p><b>March</b></p>			
<p><b>April</b></p>			
<p><b>May</b></p>			
<p><b>June</b></p>			

*Committee Plans*

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

**Chairperson:** \_\_\_\_\_

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

\_\_\_\_\_

Statement of Activity	Goals / Objectives	Responsibility and Procedures	Accomplishments

# Organizational Needs Assessment Discussion Guide

—Example—

*Current priority community problem, need or issue:*

**Example:** Obesity. Families don't eat enough fruits and vegetables and they include too much fat and calories in their diets.

*What is our organization's mission?*

**Example:** KEHA is a volunteer organization that works to improve the quality of life for families and communities through leadership development, volunteer service and education in cooperation with the University of Kentucky Cooperative Extension Service. Across the state, county extension agents for Family and Consumer Sciences work closely with KEHA members and clubs to provide educational programming and coordinate community activities.

*Is our mission relevant to this community issue?*

**Example:** Yes. Learning about nutrition and healthy family meals for long-term health is part of the Coffee County Extension County mission.

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

**Example:** Coffee County Extension Homemakers could sponsor a community cooking show with members of our farmers market using fresh, local fruits and vegetables.

*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 Homemakers can focus the cooking show on incorporating fresh fruits and vegetables with entrees, sides, salads and desserts using a quick menu approach; maybe invite a local chef and our farmers market members to also participate in live demonstrations and invite the general public to the show; 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:** Coffee County Extension Homemakers need more volunteers and leaders from our membership; We need a cooking show program planning committee and a chairman (maybe use our club foods and nutrition chairs and other interested members). We need to recruit members to volunteer for marketing the event, and we need volunteers to work with farmers market producers to prepare samples of the recipe demonstrations.

# 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?*