

CLD2-6



Developing and Implementing an Action Plan for Community Organizations

Giving New Direction to Established Organizations

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Introduction

The board of directors of most community organizations consists of community residents and leaders who have been asked to serve based upon their standing in the community, their ties in the community or their connections. Sometimes, a board has the foresight to recruit a board member based upon that individual's interests, skills or abilities. Often, new members arrive at their first board meeting with only a vague idea of their specific role or duties or the function and purpose of the board to which they have been appointed.

An action plan provides a much-needed orientation for new members (see *Educating Members, Volunteers and Leaders in Community Organizations*, CLD2-7), and most boards would benefit by developing or renewing a focus or purpose. What, specifically, is the organization's role in the community? What are the needs of the community? What is the organization's role in addressing or serving those community needs?

There are several steps involved in preparing for, developing and implementing an action plan for an organization. Following the identification of these steps, each will be discussed in greater detail. These steps include:

- Assembling the team or committee
- Preparing for the team's planning meeting

- Securing a facilitator for the planning meeting
- Focusing on "the question" for the team's planning meeting
- Determining what the team should accomplish
- Reviewing the organization's core values, vision and mission statements
- Creating the action plan
- Executing the action plan

Preparing to Develop an Action Plan

Assembling the Team

The first consideration in assembling the action team (that will ultimately be responsible for developing the action plan) is the size of the group that will be involved. The group should be large enough to be representative of a cross-section of the community but small enough to be manageable. Generally, a minimum of eight and a maximum of twelve individuals, in addition to the facilitator, will comprise a good working group.

The next consideration is determining the composition of the group. This is a critical decision. There should be a balance between those who are currently involved and those who should be involved in the organization and its programs. The action team should be composed of critical thinkers, "big picture" progressive people,

Vision without action is a day-dream. Action without vision is a nightmare.
 – Japanese proverb



and early adopters. The team should be as diverse as possible and be representative of both the community and the organization's clientele. The team should include staff, volunteers, stakeholders, community members and clientele.

Preparing for the Action Team's Planning Meeting

Some consideration needs to be given to planning meeting preparation. The meeting should be held in a neutral location and should not be held in the office or meeting facilities of the organization. Retreat settings that afford some privacy and minimal distractions are best. Creativity is often stimulated when individuals leave formal boardrooms, conference centers, and sterile or antiseptic environments. The meeting planner should provide for creature comforts, including a comfortable, enjoyable setting with minimal distractions. Meals, refreshments and breaks should be planned, with consideration given to the tastes and preferences of the individuals involved.

Working with the facilitator, the meeting planner should assemble the necessary audio-visual equipment, materials and supplies. It is generally not possible to complete the entire process in a single day. Therefore, when selecting a meeting location, plan to make accommodations for an overnight stay. Finally, encourage the participants to dress casually and comfortably.

Securing a Facilitator for the Planning Meeting

When securing a facilitator, it is imperative to find a neutral, impartial outsider. The individual must be a good listener, a consensus-builder, an alternative-seeker and must be able to summarize the group's discussion quickly and efficiently. Finally, the individual must be firm enough to take control of the group, keep the discussion on track and refocus the group.

Focusing on "The Question" for the Team's Planning Meeting

One of the most important decisions regarding the ultimate success of the team

is developing the right question. Developing the right question is imperative to keep the team focused. Developing the right question is imperative to keep the team focused, and ensures that the organization will make the best use of its time and resources as well as deal with the most important issue. Ideally, the question should be developed prior to the meeting. The board of directors should be involved in developing the question and should be in full support of both the planning process and the question that the team is addressing. During the development process, it is important to gain the input of the meeting facilitator. (It is often easier and more effective for the facilitator to guide the discussion if she or he has had input into developing or refining "the question.")

Examples of questions that could be posed to community organizations include:

- What are the greatest needs of our community?
- How could our organization serve the community more effectively?
- What are the biggest needs of the group or population?
- How can we celebrate the past while looking forward to the future and anticipating change?

Finally, when individuals are invited to participate and have agreed to serve on the team, they should be provided with the question prior to their arrival at the meeting. Receiving the question prior to the meeting is a more efficient and effective use of everyone's time as the team members are likely to begin thinking about the question (and its answers) prior to the meeting.

Determining What the Team Should Accomplish

It is important that the team understands specifically what it is expected to accomplish as well as the target dates for progress reports and completion. These expectations are generally developed by the board, meeting planner and facilitator. They should be reviewed and agreed upon by the team.

“SMART” is an acronym for: Specific, Measurable, Action-oriented, Realistic and Time-sensitive.

Developing the Action Plan

Reviewing the Organization's Core Values, Vision and Mission Statements

It is often helpful to begin the planning process by reviewing the organization's core values, vision and mission statements in order to focus the team. A word of caution is in order; for organizations to remain current and relevant, they must provide programs that both meet the needs of their clientele and help the organization achieve its mission.

Creating the Action Plan

The ultimate outcome is the development of an action plan. An action plan consists of three basic components. These include the following:

- Goals
- Objectives
- Action Steps

Goals are broad, over-arching statements that provide focus, direction and give meaning to the organization and its programs. **Objectives** are the individual strategies necessary to accomplish the objectives. **Action steps** are the specific activities that must be executed in order to achieve the organization's goals. Action steps can be short-, intermediate- and long-term. Generally, short-term goals involve those activities which should be accomplished in less than six months. Intermediate goals range from six to twelve months, and long-term goals exceed twelve months to accomplish.

All goals, objectives and action steps should be written in a “SMART” format. “SMART” is an acronym for: Specific, Measurable, Action-oriented, Realistic and Time-sensitive. Writing all objectives, goals and action steps in a “SMART” format will ensure that they are worded in such a format as to be easily accomplished.

An example of a poor goal is: “Develop a fundraiser.” Problems with this goal include being vague (non-specific), immeasurable, non-action oriented, and time insensitive. This goal is unrealistic and provides no guidance or direction to the organization.

Conversely, a great goal is: “Develop a series of fundraising activities (hosting a spaghetti dinner, selling

poinsettias, and staffing the concession both at the county fair) to be held throughout the community, which can be completed by December 10 and will raise at least \$5,000 for scholarships.”

Implementing the Action Plan

Executing the Action Plan

The completed action plan should be presented as soon as possible after its completion by the meeting planner to the council/board for adoption. Once the action plan has been adopted by the council/board of directors, 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. The development of the action plan will have been an exercise in futility if it is simply approved and placed on a shelf.

In order to execute the plan, the council/board must take responsibility for implementation and must also appoint individuals to oversee the completion of each objective of the plan. It is usually helpful to include an item “Update on executing the action plan” on the agenda of each council/board meeting and ensure that a progress report is made at each meeting. Putting specific goals and action steps into the action plan also helps keep the organization focused and increases the likelihood that the plan will be accomplished. 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.

Conclusion

Creating an action plan will benefit all community organizations by refining the organization's focus, providing direction and giving board members, volunteers and leaders opportunities for increased involvement. Many community organizations suffer from a lack of direction, relevancy or sense of purpose. Creating and implementing an action plan will cure these symptoms, re-energize members, volunteers and leaders and breathe new life into the organization.