KELD
Kentucky Extension Leadership Development
Developing and Implementing an Action Plan for Community Organizations

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Objectives

- Renew the focus of our organization’s goals
- Develop SMART goals and objectives to accomplish the organization’s purpose
- Develop an effective action plan to aid in achieving the goals of the organization
Introduction

- An organization’s board of directors consists of people with ties to the community and organization.
- Generally, new board members have little idea of their specific role or duties or the purpose of the board.
- Action plan benefits:
  - Provides a much-needed orientation for new board members.
  - Develops or renews the organization’s focus and purpose
  - Rejuvenates and invigorates boards and tenured members
Leading Questions ...

- Leading questions to consider:
  - What is the organization’s role in the community?
  - What are the needs of the community?
  - What is the organization’s role in serving those needs?
Steps in Developing an Action Plan

- Assemble the team
- Prepare for the team’s planning meeting
- Secure a facilitator for the planning meeting
- Develop and focus on “the question” for the team’s planning meeting
- Determine what the team should accomplish
- Review the organization’s core values, vision and mission statements
- Create the Action Plan
- Execute the Action Plan
Assemble the Team

- **Number:**
  - 8 – 12 people. (Large enough to represent a cross-section of the community; small enough to manage.)

- **Composition:**
  - A balance between those currently involved and those who should be involved.
  - Critical thinkers, “big picture” progressive people, early adopters
  - Diverse
  - Representative of both the community and the organization’s clientele.
  - Staff, volunteers, stakeholders, community members, clientele
Preparing for the Planning Meeting

- Held in a neutral location (away from the office)
- Retreat facilities are ideal (stimulate creativity; minimize distractions)
- Consider creature comforts
- Plan for meals, refreshments and breaks
- Work with the facilitator to assemble necessary AV equipment, materials and supplies
- Overnight accommodations
- Encourage everyone to dress casually and comfortably
Securing a meeting Facilitator

- Identify a neutral, impartial outsider
- Good listener, consensus-building, alternative-seeker
- Ability to summarize the group’s discussion quickly and succinctly
- Firm enough to take control of the group, keep the discussion on track and refocus the group
Focusing on “The Question”

- Developing the right question may be the most important decision
  - Imperative to keep the team focused
  - Ensures that the organization will make the best use of its time and resources
  - Keeps focus on the most important issue
- Involve the facilitator in developing “The Question”
- Provide all team members with “the question” prior to the planning meeting
Developing “The Question”

- Examples of questions:
  - 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?
Determine what the team should accomplish

- The Board, facilitator and meeting planner should identify expectations and milestones prior to the planning meeting
  - Reviewed and agreed upon by the team
Developing the Action Plan
Reviewing the Organization’s Core Values, Vision & Mission Statements

- Begin by reviewing the core values, vision and mission statements of the organization
- This focuses the team
- Organizations that fail to plan for the future are, in essence, planning to fail!
Create the Action Plan

- The Action Plan consists of three components:
  - Goals
  - Objectives
  - Action Steps

- All Goals, Objectives and Action Steps should be **SMART**! (Specific, Measurable, Action-oriented, Relevant, Time-sensitive)
Create the Action Plan

- **Goals**
  - Broad, over-arching statements
  - Provide focus, direction and giving meaning to the organizations and its programs

- **Objectives**
  - Individual strategies necessary to accomplish the objectives

- **Action Steps**
  - Specific activities executed to achieve the organization’s goals
  - May be short-, intermediate- or long-term.
Implementing the Action Plan
Executing the Action Plan

- Present the completed Action Plan to the council / board asap for adoption.
- Specific action must be taken to ensure that the Action Plan will be implemented and executed.
- The council / board must take responsibility for the implementation and must appoint individuals to oversee completion of each objective.
- All subsequent council / board meetings must include an item on its agenda (Action Plan Progress & Update)
Conclusion

- An Action Plan provides a road map for the organization
- Creating an Action Plan benefits all community organizations
  - Refines the organization’s focus
  - Provides direction, relevancy and sense of purpose
  - Gives board members, volunteers and leaders opportunities for increased involvement
- Creating and implementing an Action Plan will cure these symptoms, re-energize members, volunteers and leaders and breathe new life into the organization.
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