



**Citizens  
Changing  
Communities**

Fact Sheet #98-55

## **GOAL SETTING AND ACTION PLANNING SKILLS Community Board Development – No. 4**

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*“You’ve got to be careful because if you don’t know where you’re going,  
you might not get there.”*

Yogi Berra

Setting goals and developing action plans chart where you want to go as a board or group. By now, if you read and implemented Problem Solving Skills, Community Board Development – No. 3; your board has defined a problem, identified root causes, generated some alternative solutions, and begun evaluating some of those alternatives. As a board, you are now ready to move into the arena of goal setting and action planning. Sometimes problem solving naturally leads to goal setting and other times goal setting and action planning are independent of solving specific problems.

### **What is a Goal?**

It is important for boards to both conceptualize and articulate their goals. Defining goals as a board helps to create shared understanding among the members and it outlines where you want to go as a board. Goals refer to what you want to do and are usually expressed from a broad scale or perspective. Goals can also be referred to as statements of intent. An example of a goal could be: to increase community attendance at advisory board meetings. When working to solve a specific problem, the goal may be so distinct it is defined under the problem (e.g. to reduce speeding on our neighborhood streets). The nature of the problem and the intent of goal setting will

determine how specific or broad the goal should be.

Goals and objectives often get confused as being synonymous. Typically, goals state what you want to accomplish and objectives outline steps on how to reach your goal. An example is described below.

**Goal:** To increase community attendance at advisory board meetings.

### **Objectives:**

1. Place notices in local newspapers of upcoming meetings.
2. Distribute more notices of meeting agenda in shops and community centers.
3. Ask each board member to invite 3 new people to attend the next meeting.

### **What is an Action Plan?**

Goals and objectives are more effective when linked to action planning. An action plan is a way to make sure your board’s goal is made concrete. An action plan describes the way your board will use its strategies to meet its goal. A number one cause for board ineffectiveness is lack of clearly defined goals and strategies. Developing an

action plan is key to improving board effectiveness. An action plan consists of a number of actions or changes to be brought about by your board. Although action planning is tied to goal setting, it can be used for several purposes such as visioning, strategic planning, etc. Visioning takes an even broader perspective than goal setting and describes how you want your board or community to look in the future. Visioning can also be referred to as “futuring.” Mission statements are also a part of visioning and strategic planning. Visioning and strategic planning help boards to better identify and reach long term goals, such as 3 to 5 years. However, for the purposes of this Community Board Development handout, we will maintain our focus on goal setting and action planning to improve board effectiveness.

### **What should be in an Action Plan?**

An action plan should contain the following information (Figure 1):

- **WHY** is this action being carried out? List the goal statement as the first item on the action plan worksheet. Clearly defined goals help communicate with other board members why certain steps are being undertaken and what the board hopes to accomplish after the steps are completed.
- **WHAT** actions or critical steps (objectives) will occur? Outlining each critical step or task breaks the goal down into individual components. When the goal gets broken into smaller steps, the goal becomes easier to manage. Detailing the critical steps also helps the board to plan for obstacles or barriers that might arise during each action step.
- **WHO** will carry out these steps or actions? People should have specific assignments for each step or action. This section also refers to who should be included and who is responsible for making decisions if any decisions are required.
- **WHEN** will these actions take place and by what deadline? Boards, and people in general, tend to work more efficiently when they are given a timeframe. Placing a timeframe also helps the board to better strategize each sequence of steps to reach the completed target date.
- **WHAT RESOURCES** are needed to carry out the steps? Resources can include money, time, people, locations, events, etc. Resources also refer to internal and external – those resources not a part of the board but that may be required or helpful for carrying out the action step.

Action plans should be reviewed on a regular basis. If you are asking board members to be accountable and get things done, following up to check progress helps keep members motivated to complete their assigned tasks. Action plans also need to be monitored. Monitoring ensures a group stays on target and increases the success of plan implementation. An action planning worksheet (Figure 1) is contained on the next page for your convenience. Depending on your goals, timeframes, and resources, your action plan may need more or less information. Regardless of your board’s style for reaching goals, the key to board success is having clearly defined goals that all members support.

### **References**

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- Schwartz, Roger. 1994. *The Skilled Facilitator: Practical Wisdom for Developing Effective Groups*. Jossey-Bass Publisher. San Francisco. 314pp.

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This is a handout in a series of **Community Board Development** training materials.

- “Time and Meeting Management Skills”  
Community Board Development – No. 1
- “Conflict Management Skills”  
Community Board Development – No. 2
- “Problem Solving Techniques”  
Community Board Development – No. 3
- “Goal Setting and Action Planning Skills”  
Community Board Development – No. 4
- “Decision Making Skills and Techniques”  
Community Board Development – No. 5

## ACTION PLANNING WORKSHEET

<b>GOAL (WHY)</b>			
<b>TODAY'S DATE:</b>		<b>COMPLETED TARGET DATE:</b>	
<b>CRITICAL STEPS (WHAT)</b>	<b>WHO</b>	<b>TIMEFRAME (WHEN)</b>	<b>WHAT RESOURCES</b>
<b>What difficulties do we anticipate?</b>			
<b>Next meeting date:</b>			

Figure 1. Action Planning Worksheet.