



Create an Annual Plan of Action Local Action Guide

One Year to Lead

JCI Leadership Development Opportunity

Planning enables local leaders and active citizens to turn their visions of positive change into a reality.

Why

It is important to create and adopt an annual plan of action because it can help ensure:

- The organization stays on track to achieve its short and long-term goals
- Local members take ownership of the organization and its goals for the upcoming year
- The organization is accountable to achieving its mission, vision and goals

Who

A Local Board of Directors should take action to involve the entire Local Organization in the creation of its annual plan of action. Those involved directly in the drafting of the plan should include:

- Current Local President
- Local Immediate Past President
- Local Treasurer
- Local Secretary
- Local President – Elect (if determined)

It is important to involve emerging local leaders of the organization. By involving them in the action planning process now, they can help ensure continuity and momentum toward achieving long-term goals as they advance in leadership through the organization.

When

Plans of action can be created at any time to help put an organization on track to achieve its goals. However, it is recommended that a plan of action be adopted at the following times:

- Prior to a new calendar or fiscal year for the organization
- When you are establishing a new JCI Local Organization
- Following the creation and adoption of a Strategic Plan
- When your organization needs to refocus efforts to achieve its mission

What

An annual plan of action should be complete, clear and current. You can ensure your plan meets these criteria by addressing the following questions and considerations:

Mission and Vision Statement

- Why does the organization exist?



- The mission and vision are the reasons why the organization exists in the first place; therefore, your plan of action must support in achieving both. While creating the plan of action, answer this question and remind both local members and community stakeholders why the organization remains relevant today.

Each JCI Local Organization is unique and will have its own mission relevant to the local community it exists in. However, it should be closely aligned to the JCI Mission:

“To provide development opportunities that empower young people to create positive change.

Strategic Goals

- What are your organization’s long-term strategic goals that will enable the organization to adapt and evolve to achieve its mission and vision in the future?
- Usually the result of a strategic planning process, your strategic goals outline the long-term achievements your organization hopes to accomplish in the next 5, 10 and even 30 years to remain relevant and achieve its mission and vision. JCI established the long-term goal of being the organization that unites all sectors of society to create sustainable impact. It has identified five strategies to achieve this goal: Impact, Motivate, Invest, Collaborate and Connect.

Objectives

- What specific, measurable and timely goals must be achieved to enable your organization to reach its mission and vision?
- Objectives are your short-term goals for the year ahead that will allow you to get closer to achieving your long-term strategic goals and organizational mission and vision. Your objectives should be specific, measurable, achievable, realistic and timely.

Actions

- What specific actions must be taken to achieve your objectives for the year ahead?
- Actions are the specific tasks, assignments and tactics that must be completed to create the change your organization wishes to see. This is how strategies and objectives will be specifically implemented to achieve the organization’s mission and vision.

Targets of Change

- Who will be responsible for completing certain actions and achieving certain objectives?
- Every action should identify who is responsible for completing it. Whether they do it themselves or distribute responsibility to others, it is important to identify who is accountable for achieving that specific action.

Duration & Deadlines

- When should actions take place and goals be accomplished by?
- Every action should have a correlating duration and/or deadline for completion. If it is important that a certain action begin and end by a certain time, include it in the plan.

Resources Needed

- Do the defined actions and objectives require any necessary costs or resources to be completed?
- Certain actions may require specific resources in order to complete. Resources could vary such as the need of volunteers, funding, specific equipment or technology. It is important to identify these needs in advance and include them in your annual budget. It is also important to secure them in a timely manner.

Proposed Impact

- If the organization achieves its goals, what will the outcome be? What will the organization look like at the end of the year?
- It is helpful if your plan of action illustrates a clear picture of where the organization will be at the end of the year after its objectives are achieved as well as the amount of impact it will have achieved. This will help build support and ownership amongst community stakeholders for the organization in the year ahead.

You can continue to enhance your plan of action by identifying details such as the potential barriers that may hinder your organization in achieving its objectives or actions and potential collaborators to help you achieve your plan of action. It may also be helpful to create a contingency plan if certain actions or objectives are not achieved.

How to Create a Plan of Action

The annual planning process not only consists of creating the plan of action but also includes engaging organizational stakeholders to adopt, implement and evaluate the plan. Use these steps to guide you through the planning process:

Draft

1. Organize a team that will be responsible for drafting the annual plan of action. It can be helpful to include both outgoing and incoming officers to help create the plan of action to ensure continuity from year to year.
2. Provide avenues for member and stakeholder feedback concerning the organization and its activities. This could be in the form of surveys, forums, interviews, etc.
3. Conceptualize and write the plan.

Adopt

4. After a plan is drafted, it should be submitted to the Board of Directors to review and amend. They can identify any shortcomings or inconsistencies with JCI policies, or international plan of action, and make necessary changes.
5. The Board of Directors should approve a final version of the plan of action that will go before the General Assembly.
6. A final proposal of the plan of action is submitted to local members who make up the General Assembly. They have the power to make amendments to the plan of action before adopting it.
7. A final plan of action is adopted and distributed to all Local Organization members.

Implement

8. Once the plan is adopted, it's time to implement. Here are the best practices for implementing a plan of action:



- a. Deliver presentations or workshops to help local members and community stakeholders better understand the plan of action, the organizational goals for the year and their role in achieving them.
- b. Have the Board of Directors and those responsible for achieving the plan's objectives create individual plans of action for how they will stay accountable to realizing the completion of the plan of action.
- c. Create a calendar of activities based on the plan of action, and share it with the entire Local Organization's membership. Ensure to also communicate key dates and events to other stakeholders and community partners.
- d. Coordinate regular team meetings to monitor progress, identify challenges and the solutions to overcome them. Team meetings can be organized for the Board of Directors, the general membership, or specific committees or groups created to achieve certain objectives or tasks.
- e. Celebrate the accomplishment of actions and objectives. It's important that when implementing the plan, it is recognized by the entire organization.

Evaluate

9. Throughout the year, regularly follow up on the plan of action as a Local Organization to hold one another accountable in achieving it.
10. Monitor progress as key dates and milestones in your plan of action are reached. Keep track of what has been done and how well it was completed. If an action required more resources than originally anticipated that should also be noted.
11. At the end of the year the Board of Directors should evaluate implementation of the plan by answering questions like: Did the organization achieve what it sought to achieve? Why or why not?
12. Share the results of the evaluation with the organization so that they can be considered by the Board of Directors when creating the plan of action for the upcoming year as well as by the incoming board when implementing.

What Comes Next

Once you have drafted your plan of action, it's important that your Local Organization draft an annual budget for the accompanying year that outlines how resources and funds will be received and allocated to accommodate the planned activities. Once adopted, it's time to implement! Remember, a plan of action is not final once it is adopted. Review your plans monthly and update them quarterly, or whenever circumstances significantly change in the Local Organization or community.

JCI Resources to Support

Local Action Guides: Create an Annual Budget, Strategically Plan for the Future

Templates: Example JCI Local Plan of Action, JCI Plan of Action Template

Official Documents: Current JCI Plan of Action & JCI Strategic Plan

External Resources to Support

Link: [Community Toolbox Action Planning Toolkit](#)

