

Section

4 Planning and Evaluating

Planning for Success

Strategic Planning

What Is an Annual Operating Plan?

Assessing and/or Evaluating the Situation

Community Needs Assessment

Managing Your Service Projects

Project Evaluation

*Failing to plan
is planning to fail.*

This section will deal with both planning and evaluating as they go hand in hand. As a group we plan a project, but this must be followed by evaluation in order to determine whether the program will continue. The same is true of strategic and operational planning. With every step in the planning process, evaluation must follow in order to complete the cycle and begin the process again.

Advanced planning is perhaps the most important step in developing a volunteer program. You need to be ready to coordinate the volunteers (members) and to keep them interested in Altrusa. All components of the volunteer program should be well thought out and, where necessary, commitments should be secured. Planning is your road map. It keeps you focused on where you are headed and shows how you will get there. Planning will help you reach your destination on time. It keeps the loss of resources to a minimum, yet maintains your flexibility. Planning can even suggest options for modifying your route along the way.

One of the first and most basic steps in any kind of planning—strategic or operational—is **goal setting**. This is the foundation, the base from which actions are developed, implemented, and evaluated.

The simplest form of planning is finding answers to the questions: Who? What? Where? When? Why? How? And How Much? There are a few things to keep in mind when planning.

- ⌞ Your planning should be **driven by your values and vision**, not by technique.
- ⌞ **Involve** in the planning process as **many** as you can of the **Altrusans who will be implementing the plan**. Remember, both empowerment and commitment are increased when members are involved. Planning, which involves all concerned, simplifies decision making.
- ⌞ **Break projects into manageable chunks**. Take one step at a time. Don't try to accomplish everything at once.

*“A vision without a plan
is an hallucination.”*

Goals and objectives

In every type of planning it is important to develop goals and objectives. The goal is the overall umbrella statement concerning activities that are related. For example, in the International Long Range/Strategic Plan our goal dealing with service states, “Increase the quality of life through growth in service.” That is a very broad statement of what we wish to accomplish.

In contrast two of the objectives state:

- **Have each club actively participate in at least one service project annually.**
- **Increase the number of ASTRA Clubs by 2% annually.**

The difference is in detail. Goals are broad; whereas objectives must indicate what is to be done, by when, and be measurable. The hardest part usually is getting the “measurable” part into the statement. Terms such as “encourage” are not measurable. Objectives must be very specific and begin with an action verb. For example, Altrusa International, through the Club Activity Reports, can determine whether each club has done a service project and when. In the second objective dealing with ASTRA clubs we can determine quite easily if the number of ASTRA clubs increases by 2% annually. These objectives were written to be measurable.

This same kind of format is used in strategic planning, annual operating plans, and even in project planning. As an Altrusa leader you will want to know if the plans your Board of Directors and Committees are developing stay within the guidelines of good goal statements and objectives. Are they written in order to make evaluation easier upon completion of the project or club year?

On the following pages you will find information about these forms of planning.

- ⌞ Strategic planning for clubs
- ⌞ Annual operating plans
- ⌞ Planning for assessing and meeting community needs
- ⌞ Project planning

STRATEGIC PLANNING

All Altrusa clubs are encouraged to develop strategic plans. As stated above, it is your road map to the future or sometimes called a “to do list.” It is impossible to cover every aspect of strategic planning in this manual, but every Altrusa president should have at her/his finger tips a copy of the **International Long Range/Strategic Plan (LRSP)** and the guide, *Strategic Planning: A Management Tool that Helps an Organization Do a Better Job*, which can be obtained from the International office. This section will cover only the main points of strategic planning.

What is strategic planning?

Ben Tregoe, scholar and teacher, has defined strategic planning as “...**A framework that guides the choices we make in determining the nature and direction of our organization.**” That expresses very well what strategic planning is, a plan that guides the actions of the club, the committees and the board of directors.

Why should Altrusa clubs do strategic planning?

Through strategic planning an Altrusa club can:

- Do a better job of organization and follow through.
- Focus its energy.
- Ensure that all members are working toward the same goal or goals.
- Help new committee chairmen organize their thinking on what is important.
- Assess and adjust the club’s direction in response to a changing environment.

Strategic planning is a systematic process in which club members become committed to the prioritized strategies that will help them develop and maintain their strong position in the community.

Why is the International LRSP important as clubs begin the planning process?

If the organization as a whole is going to achieve the goals outlined in the LRSP, it is necessary for every club to realize its responsibility to the international plan. For example, look at the first goal—**Show a positive membership growth** and the first objective—**increase the number of members by 1% a year for the next four years.** The International Office, the International Board of Directors, and the International Committee Chairs cannot achieve the objective on their own. This is a grass roots endeavor and requires the commitment of every Altrusa club to reach our objective. The International organizations’ obligation is to offer materials and support, but it is the responsibility of every Altrusa club to see the LRSP to fruition.

How does a club prepare to develop a strategic plan?

Clubs need to do two things prior to actually developing the plan:

- Study the LRSP and determine what goals and objectives your club can and should be developing in order to assist International in reaching its goals and objectives.

- Take the time to evaluate your club. List your
 - **S**trengths
 - **W**eaknesses
 - **O**pportunities
 - **T**hreats

This is often defined as the SWOT exercise and is explained thoroughly in the strategic planning publication.

How do we begin?

Take advantage **now** of the materials prepared by International and the workshops offered in your District. Clubs must map out their future and these opportunities are there for your use. Clubs must develop their:

- Goals

- Objectives

- Strategies — how are we going to reach our goals and objectives

- Action steps — what steps must we accomplish, by when, by whom, and at what cost in order to achieve our goals, objectives and strategies.

Has your club thought about what its mission is and its relation to the LRSP? Who are you, who do you serve, and what do you do?

Implementation

Writing a mission statement and listing goals, objectives, strategies, etc. is only the beginning. Clubs must take action on their plans. They must evaluate them on a regular basis and implement the plans for them to be a successful. Implementation means using the club's strategic plan as a guide to develop the annual operating plan.

If your club does not have a plan, move the Altrusa club forward by guiding the development of a strategic plan.

Remember — If you don't have one, order your copy of *Strategic Planning: A Management Tool that Helps an Organization Do a Better Job*. Send for it today! There is no charge for this publication.

WHAT IS AN ANNUAL OPERATING PLAN?

The annual operating plan provides a detailed plan in the language of objectives, action steps, budget considerations, and who is responsible. The operating plan describes what services will be provided, what types of action will be conducted to provide these services, and who is responsible. The budget describes how much it will cost to carry out the plan.

When do we begin to develop the operating plan?

Actually, planning should begin the day after elections. The incoming president needs to begin thinking about:

- Vision—hopes and dreams for the next year.
- The strategic plan—if your club has one, what does it indicate should be accomplished during the next year. Highlight for the committee chairs portions of the strategic plan that affect their committee.
- Committee chairs—who are the best members for the positions?

Should the strategic plan be monitored prior to developing the operating plan?

Yes, each club should have a **strategic planning committee that reviews the plan annually** and offers suggestions for changes. This plan is then approved by the whole club so that every member is aware of and committed to the direction the club is taking. It is beneficial for this to be done **before March**. The revised plan then becomes a tool used in developing the operating plan.

Does your club hold a retreat for the purpose of planning each year?

Retreats can be a wonderful tool for beginning the planning process. It is an opportunity for Altrusans to get away from their daily lives and think only about Altrusa. A retreat may last more than one day, but it should be at least a full day. The critical factors to a successful retreat are:

- **Commitment by outgoing and incoming presidents!** They must work together on this. The outgoing president must make sure it is accomplished, whereas, the incoming president coordinates the effort.
- **Prior planning! Set the date way in advance.** In order to have all aspects of club work in place and ready for new officers and committee chairs at the time of installation, April is usually a good month to conduct a retreat. New committee chairs should have been appointed and the previous year's club work is winding down.

- **Total club involvement! All club members must be invited to participate.** Remember, commitment is achieved when everyone has an opportunity to express and define her/his choice.
- **Thorough evaluation!** The retreat should offer the opportunity to study the last year's programs, review the club strategic plan, and determine direction for the next year.

What are the characteristics of a useful operating plan?

- An appropriate level of detail — enough to guide the work, but not so much detail that it becomes overwhelming, confusing, or unnecessarily constrains flexibility.
- A format that allows for periodic reports on progress toward the specific goals and objectives.
- A structure that allows a user to easily see that it is consistent with the priorities in the strategic plan.
- A format that is not confusing—can everyone who needs to use the plan make sense of what it says? Is it easy to monitor?

(Allison and Kaye, page 174)

The form on the next page is designed to use in developing a basic operating plan. Copies can be given to each committee chairman and to members of the board of directors to prepare the club's operating plan.

ASSESSING AND/OR EVALUATING THE SITUATION

Before any type of planning—strategic, operating, or project—is started the club needs to assess the situation in which they plan to operate. This usually includes a complete evaluation of the previous years work in order to determine which programs to continue and those to drop.

Consensus

Consensus is very important to the group when evaluating. Basically consensus planning and evaluating are opportunities for the group to work together. Members feel their input has been acknowledged and that they have a say in the club's operation. The following is a group effort at club project evaluation. It can be fun, as well as informative, for a program meeting. This is best done in late February or early March.

- Give each major Committee Chair a sheet of flip chart paper and ask her/him to list the projects their committee is involved in. You could even add suggested projects.
- The night of the meeting tape the sheets of paper on the walls where there is easy access.
- As members arrive give them a blue dot, a red dot, and a green dot for every sheet of paper.
- Explain that the blue represents the first choice, red the second, and green the third most attractive project.
- Ask the members to study each sheet of paper and place the blue dot next to their favorite project on each sheet of paper, red on their second choice project, and green on their third choice. Hopefully, there will be several projects for each committee.
- After everyone has completed the effort, explain that you now have a visual showing what projects are the most exciting and that members feel are the most beneficial to the community and to your club.
- This effort is only successful if each committee chair for the next year takes the visual for their committee and uses it at their planning meetings.

SWOT

The importance of the SWOT exercise has already been discussed. It is another means of assessing your situation in order to make decisions for the future. Again it can be used for strategic or annual operating planning.

Brainstorming

Brainstorming is another process that is designed to generate a large number of ideas in a short period of time. This process helps to spur the creation of new and unique ideas that can help a group get excited and involved. Brainstorming can involve the whole club or a specific task force designed to evaluate a situation. It is particularly effective when doing the SWOT exercise as clubs begin to do strategic planning or during a retreat when looking for new and creative ideas.

What are the rules for effective brainstorming?

- Do not take time to discuss the ideas generated.
- Do not criticize, praise or pass judgement.
- Be spontaneous.
- Repetitions are okay.
- Quantity counts.
- “Piggyback” off the ideas of others.
- Enjoy the silences—often the best ideas come from them.
- Don’t be afraid to give outrageous or silly ideas.

What is the process?

- Post the brainstorming rules so all members can see them.
- Choose someone to record all ideas generated and post them so within view of everyone.
- The ideal group size is three to ten people. If larger, break up into smaller groups.
- Clearly define the topic to be brainstormed.
- Solicit ideas from the group as quickly as possible.
 - You can have members just call out ideas.
 - You can go around the group asking for ideas.
- Once the time limit is up or ideas stop, group similar ideas.
- Prioritize ideas within each group by:
 - Snow card technique (see below).
 - Colored sticky dots.
 - Voting.
- Formulate ideas into goals/objectives.

Note: Be sure to utilize the ideas generated. It is extremely demoralizing for a group to invest its time, energy, and creativity and have its ideas disappear. Seeing your ideas come to fruition, however, is very rewarding.

Snow card technique

Often **used with brainstorming**, this technique helps to develop a list of strengths, weaknesses, opportunities, and threats for strategic planning or just plain “brainstorming” of project ideas. It allows a group to generate a long list of ideas and then group them into categories.

Each of the ideas is written on a large size sticky note or a 5 X 7 inch card with masking tape on the reverse side. Groups must **write concisely and large** enough for all to see. After the group has written all ideas, have them placed on a wall. If the group is large have each small group place their five best ideas on the wall.

Now that the ideas are visible to all, have the ideas grouped into like areas. For example club strengths or possibly ideas dealing with membership. After all the cards are **categorized**, begin **prioritizing** within each grouping. The great thing about snowcards is that they can be moved to wherever the group prefers. Eventually, you will have a list of objectives grouped under a goal or possibly the SWOT for your club.

(Tillson, Greg)

Midyear evaluations

Midyear reviews are essential to Altrusa clubs. They advise the board of directors and committee chairs as to the areas of club work that are giving members the most satisfaction. On the following two pages is a sample midyear evaluation. If your club already has one, you may use this one as a sample for comparison.

Be sure your midyear evaluation includes a review of your club’s strategic plan.

ALTRUSA INTERNATIONAL, INC., OF _____
SAMPLE MEMBER EVALUATION OF OVERALL CLUB PROGRAM
First Six Months of 20__ – 20__

Please help our club by answering the following questions. Your answers help to plan programs and activities for the next year. Check one answer for each question. Please return to club President _____ by _____. **Thank you!**

Meetings and activities

- 1) Overall, how would you rate the **business meetings** for the year?
 Excellent ___ Good ___ Fair ___ Poor ___
- 2) Overall, how would you rate the **program meetings** for the year?
 Excellent ___ Good ___ Fair ___ Poor ___

<i>Month</i>	<i>Program</i>	<i>Group responsible</i>
July	Leadership training	Board
August	Free community clinic report	Service
September	School board representatives	Membership
October	Foreign exchange students	International Relations
November	Silent auction	Finances
December	Gifts for needy children	Service
January	Evening of the arts	Communications

- 3) What has been the **most satisfying** aspect of the year so far for you? (circle one)
- | | |
|-------------------------|-----------------------|
| Program meetings | Fund-raising projects |
| Business meetings | Social activities |
| Service projects | Committee work |
| Special service project | Other (specify) _____ |
- Why? _____
- 4) From the same list, which has been the **least satisfying**? _____
 Why? _____
- 5) What **brings you** to our meetings? _____

Committees and projects

- 6) Has your committee met **regularly** this year? (Circle one) Yes No
- 7) Do you feel you have been an **active member** on your committee? Yes No
- 8) How would you rate the **effectiveness** of the following committees/projects?
- Service projects**
- | | |
|--------------------------------|--|
| Salvation Army Dress-A-Child | Excellent ___ Good ___ Fair ___ Poor ___ |
| Sundries for battered persons | Excellent ___ Good ___ Fair ___ Poor ___ |
| Grant applications for schools | Excellent ___ Good ___ Fair ___ Poor ___ |
| College scholarships | Excellent ___ Good ___ Fair ___ Poor ___ |
| Literacy dinner auction | Excellent ___ Good ___ Fair ___ Poor ___ |

Special Service Projects

Cancer Care Homes	Excellent ___ Good ___ Fair ___ Poor ___
Hearing Aid Bank	Excellent ___ Good ___ Fair ___ Poor ___
Transitional home	Excellent ___ Good ___ Fair ___ Poor ___
Directory of interpreters	Excellent ___ Good ___ Fair ___ Poor ___
AFS student awareness	Excellent ___ Good ___ Fair ___ Poor ___

Membership Development and Training

Recruitment of new members	Excellent ___ Good ___ Fair ___ Poor ___
New member orientations	Excellent ___ Good ___ Fair ___ Poor ___
Attendance contest	Excellent ___ Good ___ Fair ___ Poor ___
“Know your members” accents	Excellent ___ Good ___ Fair ___ Poor ___
Initiations	Excellent ___ Good ___ Fair ___ Poor ___

Communications

Yearbooks	Excellent ___ Good ___ Fair ___ Poor ___
Newsletter	Excellent ___ Good ___ Fair ___ Poor ___

Comments or concerns about any of these committees: _____

General

- 9) If you could change one thing about our club, what would it be? _____

- 10) Have you ever attended a District workshop or conference? Yes No
If not, why not? _____
- 11) Are you satisfied with the support our club receives from District? Yes No
From International? Yes No
If not, why not? _____
- 12) Do you have an **interest** in working on the yearbook or newsletter? Yes No
- 13) How do you feel about our current meeting place?

Quality of food	Excellent ___ Good ___ Fair ___ Poor ___
Variety of menu	Excellent ___ Good ___ Fair ___ Poor ___
Price	Excellent ___ Good ___ Fair ___ Poor ___

Would you favor a different meeting place? Yes No If so, where? _____
 Would you favor a different meeting time? Yes No If so, when? _____

Suggestions: _____

Thank you for taking the time to complete this questionnaire. Your opinion is valuable to the success of our club and its projects.

Note to the president: This questionnaire is a sample; it would need to be adapted to reflect your club’s service projects, fund-raising endeavors, membership development, communications, etc.

COMMUNITY NEEDS ASSESSMENT

Needs assessment is the first step in choosing a new community service project. Depending on the time and energy available, the club may choose to make the process simple or more involved. Do not become overwhelmed by the list of suggested things to do. They are, just that, suggestions. The process should follow these basic guidelines:

Conduct a situational assessment

A situational assessment is a taking stock of your club, as it is today.

- Tally how many members you have, how many members are absent for part of the year, and how many are active year round.
- List the specific talents each member possesses. These may be talents in Altrusa or used at work or play.
- Review the community service projects your club is currently involved in.
 - List the pluses and minuses of each project.
 - Estimate how many people each project is helping.
 - Estimate how many hours of service each project requires.
 - Estimate how much money the club has put into each, both straight out of pocket monies and club monies.

Conduct an external environmental assessment

The community you serve does not remain static; new needs and challenges arise over time. Clubs need to respond to today's needs and prepare for tomorrow's challenges. You will want to examine them to any depth that you find satisfying. Here are some suggested ways to conduct an external environmental assessment:

- Sources of information can be as basic as your community's United Way or any other comparable local organization that has already assessed community needs.
- Local newspapers, organizational newsletters, local Chambers of Commerce, city or state offices of policy and management are all sources of information that can identify current needs.
- Focus groups are composed of about ten people from a variety of backgrounds who agree to meet solely for the purpose of discussing community needs. The information collected is variable.
 - Collate it.
 - Prioritize it, based on the number of times the needs were mentioned.
- Each member can interview two or more acquaintances, asking them what is lacking or needs changing in their community. Collate and prioritize the information.
- Interviewing community leaders is another method of collecting information on community needs. The more interviews done, the more valid the conclusions.

Identify strategic priorities

Having gathered your information, your group will need to prioritize your list of community needs. Reduce the list down to five to ten identified needs. From the list select the one community need that:

- Appeals to the greatest percentage of members. Buy-in is important!
- Fits your club members' talents.
- Attracts funding or hands-on support from other segments of the community.
- Can benefit the most from your club's involvement.
- Is not being addressed by other groups.
- Presents hands-on opportunities.
- Has financial requirements that fit your budget.

A sample *Community Needs Assessment* follows on the next three pages. If your club desires a written tool and none exists in your community, this tool has been designed to assist you in your assessment process.

(Prepared by Denise Doyan, 1999 – 2001 Service Development Chairman)

You've assessed your community's needs.

You've identified a need your club can address.

Now, draw up your ACTION plan!

Community needs assessment sample survey

Research your community and evaluate the adequacy of programs available in the categories listed below. Record your evaluation by circling “yes, no, good, avg (average), or poor.” Briefly state what, if anything, needs to be done in the “identified need” column.

Community appearance

		good	avg	poor	Identified need
Visitors first impression:					_____
Are public areas well landscaped?	yes			no	_____
Are parkways tree-lined?	yes			no	_____
Are welcome signs attractive?	yes			no	_____
Are there historical markers?	yes			no	_____
Is there a beautification plan?	yes			no	_____
Are there beautification incentives?	yes			no	_____
Any plans to upgrade unsightly areas?	yes			no	_____
Is there an Altrusa meeting sign?	yes			no	_____

Business environment

Adequacy of retail mix:		good	avg	poor	_____
Health of retail community:		good	avg	poor	_____
Adequacy of industrial mix:		good	avg	poor	_____
Health of industrial community:		good	avg	poor	_____
Adequacy of professional community:		good	avg	poor	_____

Citizenship and government

Voter registration:		good	avg	poor	_____
Voter turnout history:		good	avg	poor	_____
Programs to increase registration?	yes			no	_____
Is local government efficient?	yes			no	_____
Accessible?	yes			no	_____
Do well qualified people run for office?	yes			no	_____
Language classes for foreign-born?	yes			no	_____
Is there a new citizen ceremony?	yes			no	_____

Conservation/ environmental protection

Does your community have programs for:					
Reforestation?	yes			no	_____
Erosion control?	yes			no	_____
Soil conservation?	yes			no	_____
Water conservation?	yes			no	_____
Recycling?	yes			no	_____

Recreation

Adequacy of public parks:		good	avg	poor	_____
Adequacy of public sports fields:		good	avg	poor	_____
Adequacy of recreational programs:		good	avg	poor	_____

Cultural activities

Identified need

Is there a community historical society?	yes	no	_____
An art museum?	yes	no	_____
A cultural center?	yes	no	_____
A community theater?	yes	no	_____
A municipal band?	yes	no	_____
A symphony orchestra?	yes	no	_____
A community lecture series?	yes	no	_____
Adequacy of public library:	good	avg	poor _____
Services of the public library:	good	avg	poor _____
Is there a home-bound program?	yes	no	_____
Historical and traditional celebrations:	good	avg	poor _____
Are there int'l exchange programs?	yes	no	_____
For teachers?	yes	no	_____
For students?	yes	no	_____
For others?	yes	no	_____

Education

Is there adequate school funding for:			
Playground equipment?	yes	no	_____
Library facilities?	yes	no	_____
Laboratory equipment?	yes	no	_____
Sports programs/equipment?	yes	no	_____
Music programs/equipment?	yes	no	_____
Extracurricular activities?	yes	no	_____
Scholarships?	yes	no	_____
Tutoring?	yes	no	_____
Is there a literacy program?	yes	no	_____
Childrens' literacy	yes	no	_____
Adult literacy	yes	no	_____
Adequacy of adult education programs?	good	avg	poor _____
Is there vocational training?	yes	no	_____
Vocational counseling?	yes	no	_____

Municipal services

Adequacy of services:	good	avg	poor _____
Adequacy of surveillance:	good	avg	poor _____
Adequacy of community awareness:	good	avg	poor _____
Civil defense:	good	avg	poor _____
Fire protection:	good	avg	poor _____
Police protection:	good	avg	poor _____
Public health:	good	avg	poor _____
Public works:	good	avg	poor _____
Sanitation:	good	avg	poor _____

Safety

Does your community have:			
Safe driving incentives?	yes	no	_____
First aid education programs?	yes	no	_____
Accident prevention campaigns?	yes	no	_____

Tourism

	good	avg	poor	Identified need
Level of tourism activity:	good	avg	poor	_____
Potential for expanded activity:	good	avg	poor	_____
Are historical points well marked?	yes		no	_____
Well maintained?	yes		no	_____
Well publicized?	yes		no	_____

Assistance programs

Is there an identified resource center?	yes		no	_____
Is it well publicized?	yes		no	_____
Adequacy of services for aging:	good	avg	poor	_____
Leisure activities?	yes		no	_____
Volunteer opportunities?	yes		no	_____
Employment opportunities?	yes		no	_____
Housing?	yes		no	_____
Safety?	yes		no	_____
Transportation?	yes		no	_____
Adequacy of services for handicapped:	good	avg	poor	_____
Access to public buildings?	yes		no	_____
Leisure activities?	yes		no	_____
Athletic opportunities?	yes		no	_____
Employment opportunities?	yes		no	_____
Housing?	yes		no	_____
Safety?	yes		no	_____
Transportation?	yes		no	_____
Adequacy of services for youth:	good	avg	poor	_____
Leisure activities?	yes		no	_____
Athletic opportunities?	yes		no	_____
Employment opportunities?	yes		no	_____
Day care for working mothers?	yes		no	_____
Foster homes?	yes		no	_____
Juvenile rehabilitation?	yes		no	_____
Youth guidance clinic?	yes		no	_____
Is family counseling available to all?	yes		no	_____
Are there programs for:				
Alcoholism/drug abuse?	yes		no	_____
Care of profoundly disabled?	yes		no	_____
Child/adult abuse?	yes		no	_____
Elderly day care?	yes		no	_____
Indigent population?	yes		no	_____
Health education?	yes		no	_____
Fitness?	yes		no	_____
Illness support?	yes		no	_____
Meals-on-Wheels?	yes		no	_____
Medical alert system for the elderly?	yes		no	_____
Mental health?	yes		no	_____
Handicapped?	yes		no	_____
Lower income families?	yes		no	_____
Mentally restored?	yes		no	_____

MANAGING YOUR SERVICE PROJECTS

An Altrusa club service project is an activity accepted, approved and sponsored by the membership in response to an identified need in the local community or the international community. With a progressive plan of action, a club can develop a service project which will improve the quality of life.

Why do projects?

Participating in projects—service or fund raising—enables an individual to make a constructive contribution to the community in at least four ways:

- Meets a specific need in the community
- Builds fellowship within the club in working for a common cause
- Identifies Altrusa as a significant organization which serves the community
- Provides opportunities for personal growth and a sense of gratification to members

Effective project planning begins with a good idea that addresses a recognized need. A good community needs assessment is a most effective way of determining projects that are worthwhile and needed in your community. This was addressed earlier in this section. A successful project has a committee which guides the selection and presents it to the club as a whole for acceptance. Based on need, conceptualizing the plan is the fun part—the place to be creative in designing a general approach.

The kinds of involvement in projects are diverse. An Altrusa club may undertake a major project on its own or in collaboration with other groups. In either case, the commitment of the group may include personal service, financial support, or both. Facilities, equipment, supplies, or money may be given to individuals or groups to further their work. Projects vary, some projects require only support in the form of leadership or influential assistance from a recognized organization.

The planning process

For the project to reach a successful conclusion, your plan must be comprehensive and detailed. By specifying objectives and strategies, you and your project team will ensure that the creative idea will develop into concrete action.

The following provides ideas for effective tools on project planning and task management. Keep in mind that no “project director” is superhuman. The goals of the project are best met through a well-planned, collaborative effort. The greatest chance for success lies in shared objectives, shared duties, and a shared sense of ownership.

These tools can assist you not only in planning and carrying out the project, but also in evaluating your effort. They will become a handy record of the strategies that worked and some indication of alternative strategies for the future.

- Follow these major steps as you plan your project:
 - Clearly define the need
 - Identify the decision makers and what influences them
 - Assess resources, support and opposition
 - Set realistic objectives
 - Develop your action plan and the strategies for implementing it

Community service projects are most effective when planned on the basis of **consensus, organization, assessment and a thorough yet flexible action plan**. Unless the need is clearly defined, your effort may go in the wrong direction. For example, “literacy” is a broad topic. You have to **narrow it down, identify the problem** you want to address, and **develop specific goals** for addressing it. Know what you hope to accomplish and how you plan to evaluate the results.

- Consider these questions as you begin to think about your new project:
 - **Who has the power to make the changes you seek?**
 - **What and who influences them?**
 - **What are your resources?**
 - **What type of support do you have?**

Answering these questions may take some time and research, but will save time and frustration as you begin to actually work on your project.

Plan of action

After studying the information and resources you need to take the actions that will effect change, the written **action plan** is the next step and serves as a tool for organizing your strategies. Answer the following questions:

- **What is to be done?** (include a well defined objective)
- **Who will do it?** (specific tasks and assignment of responsibilities)
- **When will it be done?** (a time schedule that includes completion dates)
- **What resources are needed?** Be sure to consider these six resources:
 - Money (budget)
 - Manpower (Who will be needed for every aspect of the plan?)
 - Materials (tangible things needed)
 - Time (schedule of activities)
 - Public relations (What media is needed to advance the project?)
 - Authority (Who is responsible for each component?)
- **Where will the resources come from?**

Build the following elements into the action plan for maximum effectiveness:

- Mechanisms for regular communication, evaluation, and regrouping.
- Opportunities for recognizing small successes along the way. Success motivates!

(Adapted from Morrison, Emily, pages 142 – 147)

Copy the forms on pages 75 – 77 and give them to all committee chairs and project leaders to assist with the evaluation process.

Sample action plan

Project Name:

Goal:

Strategy:

Objective(s) to be achieved:

What need will be met?

By when?

How will success be measured?

At what expense?

What are other organizations or public agencies doing towards this project?

Should this project be done by our club alone or with another organization or agency?

Action Steps:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.

Allocation of resources:

Money:

Manpower:

Material:

Time:

Media needs:

Who is responsible?

Evaluation:

1. Was the objective achieved?
2. Were the resources allocated properly?
3. What are the recommendations for future action?

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PROJECT EVALUATION

Project evaluation is as important as thorough planning and is actually the **last step in the planning process**. It is critical that projects be evaluated and good notes be left for the committee chairman or project leader that is to follow. Projects may only be worthwhile for the period of time in which they took place and clubs must then move on to other endeavors. After completing a project ask yourselves:

- ⌞ To what degree is the project meeting intended goals?
- ⌞ Have the needs changed since the project was initiated?
- ⌞ Is the project continuing to serve a worthwhile need?
- ⌞ What are the key contributions/accomplishments?
- ⌞ What difficulties have been encountered?
- ⌞ How have problems been resolved?
- ⌞ What revisions are possible and advisable?
- ⌞ Has the project been explained adequately to the public?
- ⌞ Have most Altrusa members contributed/participated?
- ⌞ Has the project been financed without undue strain on the budget?
- ⌞ Is it appropriate to terminate the project?
- ⌞ Is it advisable to relinquish the project to another supporting group?
- ⌞ Is it time for the project to be self-sustaining?
- ⌞ What project will the club pursue?

Answering these questions with great care can be very enlightening and can lead to more effective strategic planning for the future. In some cases, just bringing up any one of the questions will stimulate productive discussion. **Evaluating projects will help you become more efficient and more effective.**