

Opportunity for Guidance: Planning for the New Year

July 2013

APPRECIATIVE ICEBREAKER

Business and non-profit thought leader Peter Drucker put together a self-assessment tool in the 1990s. Entitled *The Five Most Important Questions*, it consisted of a series of deceptively simple questions to help focus nonprofit leaders. They are still highly effective and highly thought-provoking today. As part of this month's guidance, we'd encourage League leaders to think about three of them as the new League year begins:

- *What is our mission?*
- *Who is our customer? (And, as an extension, how do we define membership?)*
- *What does the customer value?*

The responses solicited should help to focus conversation about the League's calendar and prioritize among the many opportunities that will come to League in the coming year.

GUIDANCE

In membership and leadership development, we're always talking about being *intentional* when it comes to planning. With new local and state boards settling in to their roles, now is the perfect time to get *intentional* about planning for the year ahead!

Each board should take the time to have a board retreat/orientation. This gives the board a chance to prepare and discuss the upcoming year. The board should take the time to discuss their goals, their expectations, and their roles to help them plan and organize their work. This helps the board build their relationship as a team. An outline for a board orientation is available [online](#) and a library of icebreakers is available in the "Tools You Can Use" chapter of the binder.

We encourage every local and state board to plan a calendar for the entire upcoming year. The board retreat/orientation or the first board meeting would be a great time to start planning out the events to come and making sure that the League will be visible in the community year-round. Be sure to incorporate membership outreach to potential and current members as well as opportunities to develop emerging leaders with each activity. Also use it as a time to get to know each other; exercises like the Leadership Compass (which is available in the binder) can help understand the leadership styles on the board team.

How to Calendar Effectively:

Ask the following questions as the calendar is being planned --

- **How can your League include one event, visibility opportunity, or activity for each month?** How can you be creative? In what easy ways can we be visible each month that don't require a lot of work (such as media releases, letter to editor, posting to a blog)? Consider an event focused on a local issue that excites your community. It might be a new issue for your League.
- **How can you incorporate state and national issues and studies into your calendar?** How can you show the power and scope of the different levels of League working together to create impact?

- **What other community-based opportunities exist?** What opportunities already exist in the community? What allied organizations could your League partner with this year? Are there groups who represent a different constituency (or set of customers) than the League who could bring a more diverse and varied perspective?
- **Where are the opportunities for more FUN in the League calendar?** Schedule a purely social activity or combine social elements with some of your events in order to give members and potential members time to get to know each other in an informal manner.
- **When are you providing opportunities for learning, growth or training for League members and leaders?**
- **How will the activities welcome or engage new members?**
- **How can you incorporate the use of the Event/Activity Planning Checklist into your annual calendaring?** When can you share this document with your entire board? How will you practice using the checklist?

What's Next?

So you've created a yearlong calendar? Great! Now, to keep up the momentum throughout the year. . .

- **Complete an Events Planning Checklist for each event about 1-2 months in advance.** This will help your League incorporate the best practices before, during, and after the event. One new idea in each box on the checklist is a great start!
- **Get others involved!** Remember that membership and leadership development is a TEAM effort. Keep involving your current and new members in all events. For example, give members small, discrete tasks for each event and learn about your members' interest so you can get them involved by asking each member to complete a short survey on what they'd like to do in the League. Connect them with an experienced leader who can mentor them as they begin to become more involved in leadership. You'll create a welcoming vibe in your League, develop new leaders, and create an atmosphere of fun and friendship.
- **Be flexible and learn from your setbacks.** Be open to new opportunities that might not yet be on your calendar. If a new and important issue pops up in your community or an allied organization asks your League to cosponsor a not-yet planned event, don't be afraid to switch up your calendar and pursue something else. Also remember that growing your membership and leadership is a **PROCESS** and is rarely linear. Setbacks are just moments from which you can learn.

What Materials are Available to Help Local Leagues?

- **Events Planning Checklist** (in the binder)
- **Calendaring Power Point presentation** (available [online](#))
- **Board Orientation Outline** (available [online](#))
- **Being Visible All Year** (Chapter 4 of the binder)