Year Planning Guidance

Creating a Club year plan can be one of the most daunting and exciting tasks for your Club. Daunting because of the time required to involve the right people and produce a high quality document that can guide you through the year. Exciting because it fully illuminates just how much your Club can accomplish in one year, and provides a roadmap to get there!
There are two essential elements to successful year planning: the execution of an effective year planning process and creating the content of the Club year plan itself. The distinction is this:

If you were to write a perfect Club year plan document, but without having engaged the rest of your Club in the process of its creation, then there is little chance that sufficient buy-in will exist among your Club for the document to be an effective road map for the year.

Thus, running a good year planning process is just as important as writing a good year plan. If successful, you will create a document that gives direction and clarity to everyone in your Club on what the Club is aiming towards this year. Your year plan will be a document that is referenced widely when planning activities and when you evaluate the performance of your Club throughout the year.

1. Pitfalls

Last year, year plans helped Clubs increase their impact significantly. However along the way many mistakes were made and lessons learned. This page will outline these common problems and pit falls. With these in mind, you will be able to think strategically and ensure successful year planning at your Club.

Most Common Problems

- **No Team Buy-in**

No team buy-in happens when the Club Captain(s) works alone on the year plan and creates a document that the executive does not support or have ownership over. ***A year plan should be a motivating document*** that captures the plans of your entire Club, a plan in which all exec and members have contributed to and consider as their creation.

- **No Follow-up**

No follow-up is when a good year plan is created but is buried as soon as it is finished, and when the year plan doesn't get referenced throughout the year to help guide and monitor progress. ***A year plan should be used to track progress throughout the year, remind you of upcoming events, allow sufficient planning and preparation, be mentioned in reports and meetings, and be used to monitor progress***. In fact, perhaps an objective listed in your year plan is to review the year plan on a regular basis!

- **Finished Too Late**

You know a year plan is finished too late when it's finished two or three months after it should be. The first few months of the year are incredibly important and if a year plan is finished too late it is much less useful. *A year plan should be finished within the first 2 months of the Club's initiation* so that it can be used to maximize the time available for Clubs to take action based on it.

- **Club Over-Stretched**

A year plan leaves Clubs overstretched when a Club takes on too many projects and is left unable to finish what is required. This puts strain on the Club and often other important activities are sacrificed. *A year plan should set goals that are lofty yet realistic*. Goals should not be set randomly; rather, they should be considered and prioritized strategically.

- **Few Tangible Goals**

Some year plans set very vague goals, and did not break goals down further as specific objectives. This provides less guidance and makes monitoring impossible. *A year plan should define specific objectives for each goal, measure both in terms of quality and quantity.*

With the above points in mind, let's look at the actual process.

2. Year planning process

As outlined above, the process for completing a year plan and making it the guiding document for your Club is as important as the content of the document itself.

A. Stakeholders

Identify the key stakeholders in your Club (executives, staff advisor, actively involved members etc.), what role you would like them to have in the year planning process, and what role they expect to have in the year planning process.

Stakeholder	Ideal Role	Expected role
Club Executive	All aspects from creation to implementation	All aspects from creation to implementation
"Member who ran outreach last year"	Contribution to goals brainstorm, communication to other Club members and implementation	All aspects from creation to implementation

The major areas of potential friction will be identifiable by a difference between the role you would like someone to have and the role they expect to have. These should be addressed on a

one-on-one basis during the process buy-in stage. (The roles will become clearer throughout this document.)

B.   Process buy-in

Getting complete buy-in to the process of completing the year plan, from all of the stakeholders you identified, is equally important to getting buy-in to the final content of the year plan. This consideration is perhaps most often forgotten and can be a source of tension.

The key here is crystal clear communication on the process that is being proposed, with great specificity on what the goals are for each part of the process, who will be involved, and the timeline and justification for all of these. There should be an opportunity for your stakeholders to comment on this process, but once it is agreed to it is a set process to follow.

Finally, once the process is established you should do everything in your power to stick very closely to it to ensure that your effort at getting process buy-in was worthwhile.

C.   Content creation

This step in the process is iterative, but driven primarily by the executives who are going to do the legwork to turn the goals and objectives into reality.

A process for content creation could look something like:

1. Club Captain structures a brainstorming session on overall focus, goals, objectives and activities with entire executive team – share with Regional Coordinator
2. Club Captain and one other member of the executive summarize the results of the brainstorming session
3. Club Captain completes a first draft of the overall goals, circulates to the rest of the executive and structures a review session. Overall goals may be revised iteratively throughout the process.
4. Executive members also complete the first draft for sections particularly related to their positions, and structures brainstorming and review sessions accordingly.
5. Review of draft year plan document with entire executive team
6. Final draft of year plan document shared with Regional Coordinator before presentation to general membership and any other stakeholders

Remember to set dates and timelines for the process!

D. Content buy-in

All of the steps in the content creation process above, in particular those that involve other Club leaders, key stakeholders and the general membership, build ownership in the content of the eventual year plan. Brainstorming/feedback sessions are particularly good for building buy-in and bringing out new ideas, as they provide an opportunity for a direct contribution to the final document. The plan is thus better and members are more excited about it.

The importance of this step in the year planning process cannot be overstated – broad ownership over the content of the year plan will allow you to use the document throughout the year to motivate members and achieve your Club's stated goals.

E. Communication of year plan (making it relevant day-to-day)

The year planning process does not end with the completion of the document – many a year plan have sat on a shelf collecting dust for 10 months until an end-of-year clean-up, that's not what you're putting all this work in for! Implementation of the year plan means that the goals and tasks that are accomplished throughout the year are driven by the year plan.

Also, the year plan should be considered a living document that empowers your Club, and doesn't constrain it. For specific tasks and responsibilities, it should be used as a starting point for the actual planning of the activities.

F. Follow-up

You should evaluate your Club's performance against stated goals and objectives at least twice each semester. This will allow you to measure success, refocus and prioritize areas in which you are going to invest more resources.

Your executive team and Regional Coordinator should be involved in the evaluation process. If you have time to involve other Club Captains or key stakeholders, this can be an effective way to energize people and refocus them on helping to attain the Club goals. This follow up can ensure that stakeholders are accountable.

3. Year plan content

A. Key aspirations

This is the sexiest part of your Club year plan, the lofty statements that make your members' hair stand on end when read aloud at your first open meeting!

"We will run open source presentations for every CS class in our university."
"We will get more petitions signed than any other school in the country this year."
"We will run an education workshop/general meeting every single week of the year."
"We will be the most active student group on campus!"
"We will have 10 individuals capable of being on next year's executive team."

Any of these are examples of key aspirations that are measurable and specific that your Club might have this year. They should be a focal point for your Club's efforts throughout the year – think of them as the goals that you are prioritizing above all others. Ask your Club the question "**above all else, what do we hope to accomplish this year.**"

You should read the recommended starting activities [link] for the year to get an idea of the kinds of tools you have for achieving your goals, and what kinds of options you might want to pursue.

Once you have determined what your key aspiration, you may want to put it in the front of the year plan, or emphasize it in your overall goals or big picture section of the year plan.

C. Goals

Goals are directional in nature and help guide the writing of specific objectives that when completed, lead to the goals being achieved. Most of the goals should align with the key programs and functions of your Club listed below:

Member Education - These are your goals about creating a group where your members are actively learning, continuously engaged, and consistently growing their skills throughout the year.

Membership Building - These are your goals around building a strong membership of engaged people. Recruiting new members, retaining existing members, and making sure you have a healthy club culture are all part of this.

Executive Building - These are your goals around recruiting, retaining, and maintaining a strong executive leadership.

Teach The Web - What will your club aim to accomplish this year to ensure that people have the skills to read, write and participate in the digital world. *See the activities page [link] for inspiration.*

Build The Web - What will your club aim to accomplish this year to ensure that people feel safe online and know how to fight for and defend against the biggest challenges and opportunities that face the internet today. *See the activities page [link] for inspiration.*

Protect The Web - What will your club aim to accomplish in order develop and support technologies that keep the web open and accessible to all. *See the activities page [link] for inspiration.*

D. Objectives

This is where you can get more specific about the goals that you outlined above. You should have many specific objectives to accomplish each goal.

Goal: **Teach 100 Computer Science Students About Open source**
Objectives:
1. Throw 10 Open Source Events
2. Get the CS department to include an introduction to Open Source in the curriculum
3. Train 5 new Open Source Mentors

Every single goal that you outlined above should have multiple objectives that are measurable and actionable.

E. Roadmap

This is where you get even more specific about what needs to happen, by when and by whom to realize your Club goals and objectives.

Protect The Web
Goal:100 Computer Science Students Learn about Open Source

Objective	Tasks	Timeline	Responsibility/ Resources

Run 10 Open Source Training Events	Identify 5 members who can host Open Source Training Events	Sept 30	Undergo training – 5 hrs
	Finalize schedule of events and confirm locations and hosts for each event	Oct 15	President + 1 other executive team member + 5 hosts– 2 hr prep, 1 hr meeting
	Set-up events/make presentations/create promotional materials	Throughout Oct/Nov	Event hosts/other exec support as necessary – 2 hrs/week at least
	Debrief blog posts and complete activity reports	Jan 1st	Event hosts/exec – 1 hr/event
Get CS Department to add Open Source Training into Curriculum	Meeting with department head	Sept 20	Director of CS + executive team – 2 hr brainstorming session + 2 hrs compiling a plan
	Recruit volunteers to start working on curriculum	Oct 1	Technology Lead + support from exec – 5 to 10 hrs

In this section of the year plan you may feel as though you are picking timelines and resource estimates out of thin air – don't worry about that. Just try to work backward from what you know to make estimates on what you don't know.