



TOOL KIT #6

STRATEGIC PLANNING

FAQ – HOW TO PREPARE A STRATEGIC PLAN

1. What are five considerations for Parent Centers preparing for Strategic Planning?

The Strategic Planning process does not have to be complicated, but there needs to be a process. Here are some main considerations for getting started.

- **Using an outside facilitator**
An outside facilitator can remain honest and critical while the Board has thoughtful and even difficult conversations. A facilitator can make sure that everyone is able to participate and be heard. A facilitator does not have an agenda or a stake in the outcome. It is hard for the Board Chair or Executive Director to facilitate and participate at the same time. Money does not need to be an issue. Your Regional Parent TA Center can assist with Strategic Planning or recommend someone to help.
- **Board role in planning process**
While the entire Board should participate in the planning process, you may want a committee to manage the process, design the logistics, or choose the facilitator.
- **Engaging senior staff and “line” staff**
Senior staff are essential to the process. They have critical information and perspective, can conduct research and do much of the “leg work”, crunch numbers, provide analysis, and write the plan. For a Parent Center the insights and perspectives of line staff can be invaluable in the strategic planning process.
- **Setting up logistics**
Some Boards prefer a one or two-day retreat. Others may prefer setting aside time in several meetings.
- **Phasing the process**
The process might be less daunting if it is broken up into distinct phases. For example, the development of activities and timelines can occur following the development of long-term goals. Your process can take place over several months, if needed.

2. What is Strategic Thinking?

Strategic Planning starts with strategic thinking. Strategic thinking is about getting to the heart of a problem, seeing the relationship between key elements, and creating a route forward. Strategic thinking seeks to answer the question, “What would success look like?”

There are several handouts in this module with tools to facilitate strategic thinking. See especially:

- Generative Thinking (2015 BLF, Dr. Cathy Trower, President and Principal, Trower and Trower, Inc.)
- [Big Picture Thinking: Blue Sky Committee](#) (Indiana Nonprofit Resource Network)

Think about the top issues facing your organization. These could include a change in program need, technology, funding, community, demographics, leadership or staff -- anything at all. Bring these issues into your strategic thinking process.



TOOL KIT #6

STRATEGIC PLANNING

3. What areas does the Strategic Plan address?

A Strategic Plan addresses multiple aspects of your organization's operations and effectiveness. Here are six examples:

- **Administration and Infrastructure** refers to changing needs for space, technology systems, financial systems and all the other business processes and people needed to keep the organization functioning well. This might also include personnel policies, salary levels, benefits, insurances, and the other areas that are foundations for successful operations.
- **Board and Volunteer Development** includes thinking proactively about the needs of the organization and a plan to recruit Board members and volunteers to bring skills, knowledge, perspectives, and other qualities needed to support the strategic direction of the organization.
- **Marketing and Outreach** refers to how the organization communicates externally with its service recipients, its stakeholders, its donors, the media, and the community at large. Effective communication is at the heart of our work and our strategy to share information effectively with diverse stakeholders.
- **Programs and Services** refers to how we meet the needs of our constituents. This includes your Parent Training and Information Center or Community Parent Resource Center grant and other programs and services you may provide.
- **Community Collaborations** looks at how to strategically enhance impact, effectiveness, and efficiency through thoughtful cooperative and collaborative work with others who are invested in the same or similar outcomes.
- **Policy and Systems Advocacy** focuses on how your Parent Center can use the information you collect on a daily basis from families to help improve systems, and engage families and youth in the process.
- **Resource Development** is core to your organization's sustainability. Consider if attention will be needed to diversify or increase your funding, and how you will approach this need.

4. What are some ways to gather information for planning?

While the perceptions and thoughts of Board members and staff leaders are important, strategic planning provides an opportunity to check in with the people served, collaborating organizations and other stakeholders, "line" staff, and bring in essential information about the external environment. This is sometimes called an Environmental Scan. It can be conducted by Board members, by staff, by a consultant, or by a combination of these.

- **Focus groups** are one way of getting nuanced feedback and input about how the organization is perceived, what is needed, and what needs of constituents are unaddressed.
- **Meetings or "key informant" interviews** with stakeholders are also powerful ways to gather information about trends, challenges, opportunities, perceptions of the organization, and what is happening in the external environment. A structured short interview questionnaire can be administered in person or by phone. Interviewers garner critical information in the process of listening deeply to parents, educators,



TOOL KIT #6

STRATEGIC PLANNING

school personnel, funders, public officials, and policy thinkers. These interviews also help to build support and connection. According to resources available, an organization may conduct a few key meetings, or interview a more extensive list of people. Make sure that you are collecting information from the full range of diverse constituents, including by race/ethnicity/language, geographic area, etc.

- **Survey data**, including needs assessments and surveys typically administered in Parent Center work. This is a good opportunity to look at the surveys you already conduct as a Parent Training and Information Center or Community Parent Resource Center and bring them to the Strategic Planning process, and to ask the community about needs and preferences. Using the Parent Center Family-Centered Services and Nonprofit Management self-assessments; the Cultural and Linguistic Competence Self-Assessment for Family Organizations; and doing a Language Access Self-Assessment can provide critical information about where your Parent Center is now and where you want to go.
- **Internal reports** and metrics reflecting areas of focus.



5. How do we use the information we collect?

The SOAR analysis is a classic tool for planning. Once the SOAR factors are identified, use the information to determine priorities, determine whether a project or goal is worth pursuing, and what is required to make it successful. Use the information you gathered above as well as your own strategic thinking to complete your SOAR analysis:

- **Strengths** – attributes and resources that support a successful outcome. Examples might include: leadership, staff resources, knowledge, or reputation.
- **Opportunities** – circumstances that could be leveraged for success in achieving your mission and vision, improve your services or competitive edge. Examples might include: a collaborative school district, a new RFP or a funder interested in your mission, a new coalition to support your work, a potential collaborator who has complementary skills you can leverage.
- **Aspirations** – a compelling vision of what you would like your Parent Center to be achieve and be in the future.
- **Results** – tangible, measureable items/goal statements that will help track your progress and demonstrate when goals and aspirations are achieved.



TOOL KIT #6

STRATEGIC PLANNING

6. How do we organize and present the plan?

Writing a Strategic Plan need not be daunting. It can be as brief as 3 or 4 pages. There is a great example in this module from the [Minnesota Council for Nonprofits](#). Your written Strategic Plan can be drafted by a Board member, the Executive Director or other senior staff person, or a consultant. Regardless of who drafts it, it should be adopted officially at a meeting of the Board. The basic format for a typical Strategic Plan is: Purpose/Opening; Vision/Mission; Goals; Strategies/Activities; Responsible People; Timelines; Metrics (What does success look like?)

Development Team:

David Blanchard, Region 3 PTAC, at P2P of GA; Glenda Hicks, Glenda Y. Hicks, CPA; Rachel Howard, Rachel Howard Consulting; Jan Serak, Region 4 PTAC, at WI FACETS

Other Contributors:

Debra Jennings, CPIR, at SPAN; Diana Autin & Carolyn Hayer, NE-PACT/Region 1 PTAC, at SPAN; Connie Hawkins, Rene Averitt-Sanzone, Laura Weber, Region 2 PTAC, at ECAC; Debi Tucker, Stephanie Moss, Region 3 PTAC, at P2P of GA; Courtney Salzer, Region 4 PTAC, at WI FACETS; Barb Buswell, Emily Rome, Jacey Tramutt, Region 5 PTAC, at PEAK; Nora Thompson, Region 6 PTAC, at Matrix



The contents of this product were developed under a grant to WI FACETS from the U.S. Dept. of Education, #H328R130010. The contents do not necessarily represent the policy of the U.S. Dept. of Education and you should not assume endorsement by the federal government.

Project Officer: David Emenheiser.

© RPTACs. For permission to use, please contact WI FACETS.