

VIRGINIA PTA STRATEGIC PLAN 2011-2014

VIRGINIA PTA is focused on the future. To accomplish its mission, Virginia PTA needs a vision for the future, as well as clearly defined goals, guidelines, and initiatives.

The following plan, approved by the Virginia PTA Board of Managers on April 30, 2011, is the result of many hours of discussion and deliberation regarding how best to meet the PTA Vision of making every child's potential a reality.

Preface Statement: Virginia PTA recognizes that we must reach a more mobile, culturally and generationally diverse population. Within this plan, we have addressed our strengths and weaknesses and established a clear and concise message of who we are and will be by 2014. We must lay the groundwork to provide the skills to enable members in becoming effective leaders in order to continue as Virginia's leading child advocacy group. We do this in order to make every child's potential a reality.



"If the past could speak to the present, it would remind us all that each of us in PTA is the history. The names and deeds may fade from our collective memory, but the constant efforts of thousands of dedicated PTA members, working in local units through the years to improve the lives of children in Virginia is written boldly in a higher place. It says simply, "these were people who cared."

Delores Delaney – VA PTA President 1987-1989

PTA Vision

- *Every child's potential is a reality.*

PTA Mission

- *To make every child's potential a reality by engaging and empowering families and communities to advocate for all children.*

PTA VALUES

- **Collaboration:**
 - *We will work in partnership with a wide array of individuals and organizations to broaden and enhance our ability to serve and advocate for all children and families.*
- **Commitment:**
 - *We are dedicated to children's educational success, health, and well-being through strong family and community engagement, while remaining accountable to the principles upon which our association was founded.*
- **Diversity:**
 - *We acknowledge the potential of everyone without regard, including but not limited to: age, culture, economic status, educational background, ethnicity, gender, geographic location, legal status, marital status, mental ability, national origin, organizational position, parental status, physical ability, political philosophy, race, religion, sexual orientation, and work experience.*
- **Respect:**
 - *We value the individual contributions of members, employees, volunteers, and partners as we work collaboratively to achieve our association's goals.*
- **Accountability**
 - *All members, employees, volunteers, and partners have a shared responsibility to align their efforts toward the achievement of our association's strategic initiatives.*

STRATEGIC GOALS

Goal #1 - Retain and Increase Membership

A. Educate all stakeholders to promote the value of PTA.

Specific Result: Membership will increase by 5% in 2011/12, and another 5% in 2012/13

1. Teach value of PTA to all leaders at LTC and any other training opportunities, to ensure appropriate recruitment and marketing strategies are utilized.
2. Market the value of PTA, and membership in it, at every program and in every publication. Make it meaningful and relevant.
3. Reach out to potential student members as a means for fostering civic involvement in their own school community.
4. Provide specific talking points to local unit, council and district leaders to enable them to promote value of PTA to their stakeholders.
5. Specifically train principals and other education system stakeholders on the value of PTA.
6. Collaborate with other groups with similar goals and values, i.e. booster clubs.
7. Broadcast PTA PSAs statewide.

B. Extend the reach of membership to mirror Virginia's demographic.

Specific Result: Our Membership and State Leadership roles will be more representative of the demographic makeup of our state.

1. Create and implement a membership campaign directed at potential male members.
2. Create and implement a membership campaign directed at potential student members.
3. Create and implement a membership campaign focused on cultural, ethnic and minority groups.

C. Create membership programs and tools that help retain and increase members.

Specific Result: Membership Chairpersons will utilize programs and tools to increase membership at the local unit level.

1. Develop membership messages for leaders to share significance of PTA membership.
2. Utilize YouTube to share membership benefit videos.
3. Videotape LTC presentations for on-line membership training.
4. Re-invent the membership awards so that they are more meaningful.
5. Create partnerships with retailers to benefit all members of PTA within state.
6. Have regional membership training opportunities.
7. Create membership campaign consistent with the annual membership theme.

D. Investigate and implement avenues that specifically target secondary student membership.

Specific Result: Student memberships in VA PTSAs will increase by 10%.

1. Market to students on their level through social media, text messaging, on-line resources, etc.
2. Create a student leadership program with trainings geared towards developing tomorrow's leaders.
3. Identify and promote the use of academic success programs to assist secondary students and their families in post secondary preparation.
4. Use a specific and separate marketing campaign for student members.
5. Develop information for middle schools to incorporate student members.
6. Create a list of potential partners specifically beneficial to PTSAs.

E. Create membership programs and tools that increase number of local units.

Specific Result: State leaders will utilize programs and tools that increase number of local units.

1. Develop recruitment message for state leaders to promote benefits of PTA to potential local units.
2. Provide district leaders training in approaching potential local units.
3. Distribute New Unit Resource Guide as requested, followed by a personal call and assistance.
4. Utilize YouTube to share PTA benefits videos.

Goal # 2 - Broaden the Scope and Training of all Members

A. Develop PTA basic skills training for local unit members that are accessible and available.

Specific Result: A continually updated 'database' of basic training modules would be readily available to assist the immediate basic skills needed at local unit level. These modules would include but not be limited to online tutorials, webinars, webinars, and other leadership training opportunities.

1. Assess and develop a PTA training tool for every member on the website "The Guide to PTA".
2. Assess and develop training sessions that can be used consistently by any trainer across the state.
3. Update the website to include section for FAQs.
4. Post all available training dates throughout the state including districts and councils on the website to allow cross participation.
5. Assess the need for multi-lingual training materials and develop as needed.

B. Offer training and resources for all membership levels that are not only accessible, but also applicable and affordable.

Specific Result: Provide PTA membership with specific training and materials that are relevant to their PTA goals.

1. Develop job specific trainings and materials.
2. Offer day long regional training sessions that do not require long distance travel or overnight hotel stays.
3. Update the Local Unit Resource Guide (LURG) and other training materials monthly and post to the website so that they are readily available and easily accessible.
4. Use technology to offer online access to video trainings, webinars, and e-learning communities.

C. Develop a calendar that would correspond training with the timing of actual membership needs.

Specific Result: PTA Leaders would have a reminder of upcoming tasks with training modules scheduled to review/reteach strategies to accomplish their goals. The comprehensive calendar would include the basic PTA tasks for a local member and board member needs to be successful.

1. Review current PTA best practices and identify timeline for training opportunities.
2. Gather detailed list of deadlines and events of PTA interest and the person responsible for that task.
3. Have a detailed calendar on the Virginia PTA website that would be virtual, downloadable, and compatible with Google calendar.
4. Offer specific trainings compatible with the time of year (ex: audits offered in June; citizenship essay in November).

D. Provide leadership training to encourage the future development of leaders in every aspect of the PTA.

Specific Result: All members would have access to training dates across the state and would feel welcomed to attend.

1. Address training invitations to all PTA members (rather than Dear PTA Local Unit Leaders).
2. Identify and develop qualified trainers from across the state.
3. Encourage local units to place flyers on their PTA websites, newsletters, and social media pages or home in backpacks.
4. Host regional events in neutral areas such as libraries or community centers.
5. Establish and implement a plan to recruit and train district and/or council leadership.

Goal # 3 - Develop Effective Two-Way Communication Methods

A. Identify areas for website improvement.

Specific Result: Sustain a website that supports the current needs of local units.

1. Provide user-friendly on-line experience for local units.
2. Identify and secure skilled web-designer to assist with web-design and maintenance.
3. Maintain up-to-date information in a timely manner.
4. Incorporate social media to engage members.
5. Provide web forms to be submitted on-line; i.e. officer form.
6. Provide capability for training webinars for local units.
7. Make it easier to navigate, more attractive and cleaner – see www.pta.org.

B. Identify, research and implement a web-based meeting solution for Board of Managers (BOM) and training at all levels.

Specific Result: Provide ease-of-access training for all PTA members regardless of involvement level.

1. Research and select electronic or web-based meeting solutions.
2. Create a booklet of electronic or web-based meeting solutions for the BOM with specific direction on when/how to use.
3. Utilize electronic or web-based meeting whenever possible to minimize cost and increase ease-of- access.
4. Adapt LTC basic trainings into webinars.

C. Research and implement on-line Proposed Legislation Program (PLP) voting methods.

Specific Result: Allow members to utilize on-line voting to increase participation.

1. Research and select the best avenue for on-line voting to use for PLP.
2. Identify responsible person to oversee on-line PLP voting.
3. Provide information to assist local units in participating and conducting on-line PLP voting.

D. Develop methods to communicate directly with the individual member levels.

Specific Result: Communication is ongoing and useful between all levels of VA PTA.

1. Add social media links on website.
2. Provide interactive calendar on website that includes all programs across the state.
3. Host online and electronic chats with state chairpersons to link local unit member leaders.
4. Collect contact information for local unit members/officers.

E. Develop methods of communication as an option for members who do not have access to technology.

Specific Result: Implement methods for reaching rural PTAs.

1. Provide personal visits from state leaders.
2. Offer printed copies of PTA materials as requested.
3. Recruit full district boards, and provide mentorship, in less-served areas.
4. Conduct monthly conference calls for specific areas; i.e. membership, fundraising, programs.

Goal # 4 - Ensure Long-Term Financial Viability

A. Assess existing financial procedures and ensure fiscal accountability.

Specific Result: Operate within a balanced budget.

1. Develop and maintain a realistic budget for the association, based on current membership numbers and realistic revenue expectations.
2. Evaluate current budget development process for effectiveness and implement changes as needed.
3. Review and amend adopted annual budget as necessary to present an accurate financial record of the association.
4. Develop written narrative to explain line items in the budget.
5. Promote financial responsibility and accountability to all PTA leaders through training and information in all PTA publications.

B. Evaluate and improve dues payment structure.

Specific Result: Full payment of all dues revenue collected.

1. Develop a structure for monthly payment of dues by local units.
2. Establish a method for notification to local units for dues payments, to include a payment booklet, followed up with electronic and hard copy reminders.
3. Research and implement a feasible electronic method for dues payment.

C. Explore new non-dues revenue opportunities.

Specific Result: Increase non-dues revenue.

1. Recruit grant writers to serve on Resource Development committee.
2. Evaluate effectiveness of Virginia PTA store and seek ways to increase revenue from operation. Seek a dedicated volunteer to maintain, operate and promote Virginia PTA store.
3. Explore and implement new and varied ways for vendors to participate and generate non-dues revenue.
4. Seek new and varied sponsorships for events, programs and publications of Virginia PTA that align with Virginia PTA mission and purposes.
5. Pursue opportunities for more and varied pass through grants for programs such as Healthy Lifestyle, Parent Engagement, and Arts in Education.
6. Develop and maintain a database of vendors, exhibitors, sponsors and grants, to provide a historical record.

Goal #5 - Improve Organizational Effectiveness

A. Improve the effectiveness of the VA Board of Managers to meet the needs of the association.

Specific Result: The needs of the association will be met by the Board of Managers (BOM) as the Board will provide effective and improved services to local units, councils, and districts.

1. Evaluate current BOM structure to implement this strategic plan.
2. Review other state PTAs organizational structure and best practices. Develop a plan for implementation of updated or revised structure to serve the needs of the association.
3. Establish and implement a plan to develop leadership in underserved districts.
4. Make appropriate changes to the BOM structure as needed, specific to the implementation of this plan.

B. Improve the effectiveness of the state office to meet the needs of the association.

Specific Result: The needs of the association will be met by the state office staff. The State Office will provide effective and improved services to the Board of Managers (BOM), local units, councils and districts.

1. Identify the needs of the association for state office services through a survey of the Board of Managers.
2. Review other state PTAs central office staffing to determine organization structure and best practices.
3. Define what it means for the state office to be effective and efficient. Develop tasks to meet the definition of effectiveness.
4. Evaluate procedures to measure the effectiveness of the office staff to meet the needs of the association:
Evaluation Options:
 - a) Review current responsibilities of BOM and office staff to determine if duties overlap.
 - b) Determine if state office staff can accomplish duties currently being performed by BOM members.
 - c) Implement procedure for initial contact for programs and awards submissions and notifications; Determine if initial process of program applications and award recipients could be served primarily by the office staff in partnership with committees and officers.
 - d) Identify technological systems and other resources needed to assist office staff in task fulfillment.
 - e) Evaluate utilization of electronic delivery of information to stakeholders with measured results in increased cost reduction and effective time management of central office staff.
 - f) Assess need for additional paid office staff to accomplish re-distributed duties.
5. Evaluate and improve delivery of communications to BOM, districts, councils, and local units;
Evaluation options:
 - a) Train staff about PTA levels, requirements, and programs to ensure understanding of in-coming requests.
 - b) Implement plans for quick response to inquiries with knowledgeable and correct information as quality and consistency of information determines customers' confidence in staff responses.
 - c) Determine availability of state office staff to oversee web site, Bulletin, and Voice communication tools.

C. Expand the scope, knowledge and use of PTA Programs.

Specific Result: Local unit leaders and members will have easier access and knowledge of PTA programs.

1. Evaluate the vapta.org website regarding programs. The website program information should be easy for members to access.
2. Determine how to keep website information up to date.
3. Redesign the LURG so that it is easier for local units to use.
4. Update all program handbooks so they focus on local unit needs.
5. Develop a program based Great Ideas bank.
6. Promote use of the Local Unit Resource Guide by all stakeholders.
7. Utilize the Voice e-newsletter as an effective tool to promote PTA programs.

D. Market the value and image of PTA.

Specific Result: Create a positive, current and diverse image of the PTA.

1. Evaluate the current image and marketing plan of the Virginia PTA.
2. Review the possibility of hiring a Marketing Consultant that has non-profit experience.
3. Create a marketing plan:
 - a) Provide information about Virginia PTA as a child advocacy group
 - b) Update image to reflect the diversity of our members and leaders
 - c) Advertise
4. Evaluate the Bulletin as an effective marketing and informational tool for the Virginia PTA.

Goal #5 - Improve Organizational Effectiveness cont.

E. Implement a plan to combine LTC and Convention.

Specific Result: Event Logistics. Given a planned implementation of Summer 2012, logistics for a combined event must be set by November 2011- dates, location, cost estimate per member.

1. Determine time of year to hold event- Summer (LTC) or Fall (Convention) with needed implementation of combined event in 2012.
2. Determine number of days needed to conduct all business of the association while maintaining integrity of leadership training that is so successful with LTC.
3. Name combined event chair and committee summer 2011 (assuming summer 2012 implementation).
4. Determine best location option for event- school (LTC) or Convention-type center.
5. Develop an event schedule based on number of days needed to include multiple workshop sessions, sufficient hours to conduct business, offer time to vendors, and present awards.
6. Identify which awards/presentations (if any) should be made at combined event (Reflections, Child Advocate, Membership, Volunteers, Nurses, etc.)
7. Ultimately determine registration cost (goal) per participant.

F. Implement the plan to combine LTC and Convention.

Specific Result: Review and update all internal processes of the association so that a combined LTC/Convention event is possible.

1. Conduct a full review of Virginia PTA By-laws and identify any changes that would need to be made to implement a combined event.
2. Prepare identified By-laws amendments for Convention 2011.
3. Conduct a full review of Virginia PTA SOP and identify any changes that would need to be made to implement a combined event.
4. Prepare any SOP amendments as needed.
5. Conduct a full review of all committee work to determine any concerns/issues with a combined event especially Resolutions, Legislation, Membership, Reflections.
6. Conduct a full review of current BOM meeting schedule. Make changes to the schedule so that all Board work can be conducted and meetings held given a combined event held in the summer.
7. Conduct a full review of statewide mailing schedule to determine changes so that all mailings are right timed with appropriate information given a combined summer event.
8. Develop a post-convention/election training schedule that would meet the requirements of National PTA.

G. Implement the plan to combine LTC and Convention

Specific Result: Develop an election cycle transition plan given new Convention time-frames.

1. Gather information from other states that have made transition to combined event to see what they decided with terms for officers and election cycles.
2. Given a summer combined event (most likely scenario) decide if terms should be shortened or extended for one election cycle.
3. Develop a plan for implementing new election cycles including updates to timeframes for NLDC and Bylaws provisos and changes.

H. Implement the plan to combine LTC and Convention.

Specific Results: Plan and market new combined LTC/Convention event.

1. Identify logo/theme for combined event by November 2011 (assuming summer 2012 event).
2. Gather information from Local Units on their concerns/request/feedback on a combined event. Ask them what they'd like to see, what they don't want to see etc.
3. Develop marketing strategy for messaging the benefit of combining the two events. Market this message statewide.
4. Implement full marketing strategy at Convention 2011 (assuming summer 2012 implementation). Celebrate this new event BIG at Convention 2011!

Strategic Plan Steering Committee

Debi Abadie
President
Newport News

Anne Carson, *Committee Chair*
President-Elect
Glen Allen

Brenda Sheridan
Vice President
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Christopher Corallo, Ed.D. *Facilitator*
Executive Director of Organizational
Development, Quality, and Innovation
Henrico County Public School

STRATEGIC GOAL	Action Team Leaders	Action Team Members
Retain and Increase Membership	Rebecca Poma, <i>Membership Chair</i> – Shenandoah	John Beamer – Parkway Sharon Thomas – Roanoke Brenda Sheridan – Hunt
Broaden the Scope of Training for all Members	Mary Voss, <i>District Director</i> – Tidewater Ramona Morrow, <i>Past State President</i> – Northern Virginia Karen Fellows, <i>District Director</i> - Southeastern	Ali Brown - Richmond Lisa Harvey – Shenandoah Sharon Thomas – Roanoke Monica Smith – Tidewater Ive Castro – National PTA Jacqueline Jackson – Peninsula Laurel Garrelts – Peninsula Nicole Sheppard – Roanoke Reverend James Jackson - Peninsula Stella Edwards – James River Members of Chesterfield and Fairfax County Councils
Develop Effective Two-Way Communications Methods	Karen Molloy, <i>Communications Chair</i> - Peninsula	Traci Blido – Roanoke Ali Brown – Richmond Denise Bowman – Scott – Tidewater Kimberly Griffin – Peninsula Rebecca Poma – Shenandoah Monica Smith – Tidewater
Ensure Long-Term Financial Viability	Melissa Nehrbass, <i>Past State President</i> – Peninsula Jennifer Young, <i>District Director</i> - Richmond	Mary Swears – Southeastern Maria Browning – Peninsula Bill Levey – NOVA Chuck Lionberger - Roanoke
Improve Organizational Effectiveness	Debbie Kilpatrick, <i>Education Chair</i> , NOVA Wendy Logan, <i>Volunteers Chair</i> , Richmond	Len Litton – NOVA Bob Shaw – NOVA Reverend James Jackson – Peninsula Diane Gillespie – Tidewater Terry Matlaga Bell NOVA Lisa Harvey – Shenandoah Ramona Morrow – NOVA