

# PTA National Strategic Plan 2007–2010

**PTA** is focused on the future. To accomplish its mission, PTA needs a vision for the future, as well as clearly defined goals, guidelines, and initiatives. Therefore, in 2006, a broadly representative group of PTA volunteers and staff accepted the responsibility of drafting a strategic plan to guide PTA's work over the next three years. Carrying out the plan will continue the volunteer-staff partnership.

The strategic planning process involved seeking feedback from PTA members and others. Concerns and suggestions regarding what PTA should do to better serve our nation's children were gathered from more than 8,000 PTA members across the country through surveys, interviews, and 22 town hall meetings. The key issues raised by PTA stakeholders included strengthening and diversifying PTA leadership and membership, increasing the effectiveness of the PTA organizational structure, improving communications, demonstrating the value of PTA for all communities and families, and remaining grounded in the reason PTA was founded more than a century ago—to serve all children and families.

The following plan, approved by the PTA National Board of Directors on March 12, 2007, 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.

# PTA Vision

Making every child's potential a reality.

# PTA Mission

PTA is

- \* A powerful voice for all children,
- \* A relevant resource for families and communities, and
- \* A strong advocate for the education and well-being of every child.

# PTA Values

**Collaboration:** We work in partnership with a wide array of individuals and organizations to accomplish our agreed-upon goals.

**Commitment:** We are dedicated to promoting children's health, well-being, and educational success through strong parent, family, and community involvement.

**Accountability:** We acknowledge our obligations. We deliver on our promises.

**Respect:** We value our colleagues and ourselves. We expect the same high quality of effort and thought from ourselves as we do from others.

**Inclusivity:** We invite the stranger and welcome the newcomer. We value and seek input from as wide a spectrum of viewpoints and experiences as possible.

**Integrity:** We act consistently with our beliefs. When we err, we acknowledge the mistake and seek to make amends.

# PTA Strategic Initiatives

1. We will increase and retain our membership.
2. We will value and be inclusive of our diversity.
3. We will identify, develop, and affirm our present and future leadership.
4. We will create and sustain long-term financial viability.
5. We will implement improved organizational effectiveness.

# Strategic Initiatives

## 1. We will increase and retain our membership.

**Goal:** Membership will increase by at least 2 percent annually; growth will be measured using the June 30, 2007, membership numbers as the baseline.

**“Make membership everyone’s business.”**

—Warlene Gary, PTA national CEO

### Objectives and Action Steps:

#### A. Include membership as a priority in every PTA activity.

- \* Set PTA goals that support the PTA Vision, Mission, and Strategic Initiatives—to be done by the PTA National Board of Directors with input from members.
- \* Aggressively promote the PTA Vision through internal and external communications, marketing, and field outreach.
- \* Target membership efforts in critical areas and where opportunity is abundant.

#### B. Sustain current membership.

- \* Condense survey data and other information from members to five key issues to be addressed.
- \* Seek insights and solutions from other organizations with large national memberships.
- \* Develop and implement a long-range membership plan based on the information gathered from members and other membership organizations.
- \* Consistently and continuously emphasize the value of PTA membership.
- \* Track and report membership status to PTA National Board of Directors at quarterly intervals.
- \* Design and implement interventions.

#### C. Explore new membership options with other child-serving groups.

- \* Assess current strategic alliance partnerships with regard to current membership goals.
- \* Create a list of potential new partner groups.
- \* Define the value of utilizing strategic alliance partners in membership development.

- \* Develop and implement new membership recruitment options and strategies in partnership with strategic alliance partners.

#### D. Target and secure critical member market segments.

- \* Build, sustain, and expand the work of the PTA Community Connections initiative, which is focused on building PTAs in large urban communities.
- \* Affirm target markets.
- \* Define specific approaches for each market.
- \* Initiate approaches in multiple markets (geographic and ethnic).
- \* Adjust and revise approaches to respond to what is learned and to ensure effectiveness in each market area.

#### Membership Milestones:

##### 2007–2008:

- \* The number of schools and alternative PTA sites included in PTA membership increases by 2 percent.
- \* Membership increases by 5 percent in at least three target markets.

##### 2008–2009:

- \* PTA has a fully developed plan for nontraditional membership options.
- \* The number of schools and alternative PTA sites included in PTA membership increases by an additional 2 percent.
- \* Membership increases by 5 percent in at least six target markets.

##### 2009–2010:

- \* The number of schools and alternative PTA sites included in PTA membership increases by another 2 percent.
- \* Membership increases by 5 percent in at least 12 target markets.

## 2. We will value and be inclusive of our diversity.

**Goal:** PTA membership and leadership will be more reflective of the diversity of the population of the United States.

**“The National Congress of Mothers, irrespective of creed, color, or condition, stands for all parenthood, childhood, homehood. Its platform is the universe, its organization, the human race.”**

—Alice McLellan Birney, cofounder and first president of PTA

## Objectives and Action Steps:

### A. Establish/affirm a working definition for “diversity.”

- \* Examine work being done in cultural competency.
- \* Review, discuss, and update the current PTA definition of diversity as recommended by the PTA National Committee on Diversity.
- \* Explore existing partners’ approaches and techniques in the area of diversity.
- \* Focus energies on all children.

### B. Seek partners with successful experience in diversity.

- \* Reach out to current strategic alliance partners that represent diverse populations.
- \* Define a list of additional potential partners for collaborative work.
- \* Identify new approaches for diversifying PTA.

### Diversity Milestones:

#### 2007–2008:

- \* PTA increases involvement with minority-based child advocacy and service organizations.
- \* The 2008 PTA member and leader surveys indicate increases in ethnic minority membership and leadership.

#### 2008–2009:

- \* PTA is a highly recognized authority on membership diversity.
- \* Continued increases in PTA ethnic minority membership and leadership are documented by the PTA member and leader surveys.

#### 2009–2010:

- \* PTA serves in an advisory capacity for at least six minority-based child advocacy organizations.
- \* Continued increases in PTA ethnic minority membership and leadership are documented by the PTA member and leader surveys.

## 3. We will identify, develop, and affirm our present and future leadership.

**Goal:** PTA will provide resources and tools to support leadership development.

“If your actions inspire others to dream more, learn more, do more and become more, you are a leader.”

—John Quincy Adams, sixth president of the United States

## Objectives and Action Steps:

### A. Define working models for PTA leadership development.

- \* Compile current PTA leadership development practices.
- \* Benchmark leadership practices of similar associations.

- \* Define and initiate approaches focused more on leadership skills and less on seniority.
- \* Define PTA leadership philosophy.
- \* Promote PTA board self-evaluation processes at all levels of the organization.
- \* Define additional ways to utilize past leaders.
- \* Identify potential leadership candidates from outside PTA.

### B. Sustain annual Emerging Minority Leaders Conference.

- \* Work with the PTA National Committee on Diversity to determine conference goals and desired outcomes.
- \* Follow up with and engage attendees in their states and communities.

### C. Work with PTA state leadership to build their organizations’ capacity.

- \* Work with state PTAs on improving leadership development practices.
- \* Work with state PTAs to strengthen region, district, council, and local leadership.

### Leadership Milestones:

#### 2007–2008:

- \* Leadership initiatives and events are held for all levels of PTA.
- \* The 2007 Emerging Minority Leaders Conference meets registration and programmatic goals.
- \* Nationally trained leaders are utilized by at least 75 percent of the states.

#### 2008–2009:

- \* Nationally trained leaders are utilized by 100 percent of the states.
- \* Plans for a PTA National Advisory Board are initiated.

#### 2009–2010:

- \* PTA leaders reflect the diversity of the nation’s population.
- \* PTA has a national advisory board comprised of key corporate, academic, and service organization leaders.

## 4. We will create and sustain long-term financial viability.

**Goal:** PTA will increase dues revenue by 2 percent annually through new membership sources and develop \$5,000,000 in new nondues revenue over a five-year period.

“It sounds extraordinary but it’s a fact that balance sheets can make fascinating reading.”

—Mary Archer, scientist

## Objectives and Action Steps:

### A. Review the dues structure annually.

- \* Review and oversee implementation of recommendations from the dues structure committee—to be done by the PTA National Finance Committee.
- \* Evaluate the value received for dues and define a new approach to demonstrating that value.
- \* Review and evaluate the dues structure and dues process annually.

### B. Evaluate the current sponsorship model.

- \* Explore ways to increase the value of sponsorships.
- \* Define and conduct market analysis of desirable sponsors.
- \* Work with constituent organizations to strengthen sponsor relationships.

### C. Explore and secure new funding strategies.

- \* Research and develop events and funding strategies through foundations, grants, annual giving campaigns, member benefits, and new events.
- \* Determine an approach to each funding source.
- \* Conduct market analysis for potential strategies.

### D. Explore ways to make national events cost-effective.

- \* Review trend lines of the last five events.
- \* Benchmark other associations' models for national events.
- \* Implement cost-effective strategies for conferences, conventions, and other events.

### E. Develop the PTA national governance structure as a funding source.

- \* Benchmark giving levels of governance of other national associations.
- \* Develop and implement a five-year plan for increasing governance philanthropy.

### F. Explore ways to sustain fiscal effectiveness.

- \* Educate all governance members on PTA financial operations.
- \* Annually review the costs and effectiveness of existing programs, projects, and other aspects of PTA operations.
- \* Annually examine the internal and external factors affecting the organization and its funding.
- \* Seek suggestions from governance of ways to maintain fiscal effectiveness.
- \* Forward all suggestions from governance to staff for consideration in creating the budget.

### Financial Viability Milestones:

#### 2007–2008:

- \* Nondues revenue is increased by \$1,000,000.
- \* A financial module is incorporated in PTA's training of national and state leadership.

- \* All governance members are involved in the annual giving campaign.

#### 2008–2009:

- \* PTA national events are financially viable.
- \* Nondues revenue is increased by at least \$1,000,000 above the previous year's total.

#### 2009–2010:

- \* Grants support between 30 percent and 50 percent of PTA programs and work efforts.
- \* Endowment fund contributions increase by 15 percent.

## 5. We will implement improved organizational effectiveness.

**Goal:** PTA will improve overall responsiveness and effectiveness in order to increase the capacity of the organization.

*“To work in the world lovingly means that we are defining what we will be for, rather than reacting to what we are against.”*

—Christina Baldwin, author and educator

## Objectives and Action Steps:

### A. Assess the effectiveness of national headquarters.

- \* Appraise the effectiveness of national headquarters operations.
- \* Explore and benchmark alternative organizational structures.
- \* Develop a plan for implementation of the optimal organizational structure.

### B. Assess the effectiveness of the governance structure.

- \* Appraise the effectiveness of the national governance structure.
- \* Explore and benchmark alternative governance structures.
- \* Develop a plan for implementation of the optimal governance structure.
- \* Develop and implement a PTA National Advisory Board comprised of corporate, academic, and child advocacy leaders.

### C. Clearly define the function of the Online Membership Data Reporting (OMDR) system to guide improvements that will enhance its value and use.

- \* Utilize survey data and other information to identify issues and perceptions.
- \* Develop and prioritize recommendations for OMDR improvements and enhancements.
- \* Implement OMDR improvements on a continuing basis.

#### **D. Effectively communicate the organizational structure, including the roles and responsibilities of constituent organizations.**

- \* Develop a communications plan regarding national staff roles and responsibilities.
- \* Clarify reciprocal relationships among the national organization and its constituent organizations.
- \* Develop communications protocols for all levels of the organization.
- \* Implement communications protocols across the organization.

#### **E. Explore alternative methods of parliamentary procedure.**

- \* identify and evaluate best practices and alternative models.
- \* Develop recommendations for changes that support the organizational structure.

#### **F. Align the state and local unit chartering process and the Standards of Affiliation with the organizational structure.**

- \* Audit current practices.
- \* Develop consensus among the states on core requirements for charter and benchmarks for exceeding core requirements.

- \* Develop consistent processes to implement core requirements and benchmarks.

- \* Develop procedures to ensure compliance.

#### **Organizational Effectiveness Milestones:**

##### **2007–2008:**

- \* The effectiveness of national headquarters and the governance structure is assessed; the assessment will be repeated biannually.
- \* Communications protocols are implemented across the organization.
- \* Continual improvements in OMDR are reflected in increased use by local units.

##### **2008–2009:**

- \* The PTA website is a major membership communication tool.
- \* The 2008 PTA National Convention pilots a simplified approach to parliamentary procedure.

##### **2009–2010:**

- \* PTA is a strong strategic partner of at least six key national education organizations and associations.
- \* E-mail addresses have been obtained for half the names in OMDR, facilitating communication with members.

## **Strategic Planning Committee**

### **Chair**

Jan Harp Domene, 2005–2007 PTA National President-Elect

### **Volunteers**

Anna Weselak, 2005–2007 PTA National President  
Chuck Saylor, 2005–2007 PTA National Secretary-Treasurer  
Lew Frederick, Former PTA National Board Member  
Michelle Humphreys, 2006–2008 Texas PTA President  
Mary Kenfield, Director of Public Policy and Community Relations, Washington State PTA  
Melani Luedtke-Taylor, Secretary, Sunny Slope PTA, Omaha, Nebraska; 2007–2009 Nebraska PTA President-Elect

David Squires, Awards Chair, Michigan PTSA; Student, Central Michigan University

Teresa Williams, 2005–2007 Colorado PTA President

### **PTA National Staff Members**

Warlene Gary, Chief Executive Officer  
Kimberly Barnes-O'Connor, Deputy Executive Director  
Carole Levine, Deputy Executive Director  
Ardith Stansell, Deputy Executive Director  
Linda Whittington, Deputy Executive Director  
Judith Myers, Director of Communications  
Tom Nguyen, Director of Resource Development  
Tina Dove, Public Policy Coordinator



*everychild.one voice.*<sup>®</sup>

(800) 307-4PTA (4782)

info@pta.org \* www.pta.org