

FOR COMMENT

Getting Strategic

Long-Range Planning for Local Leaders



Building Full Capacity Locals

MEA

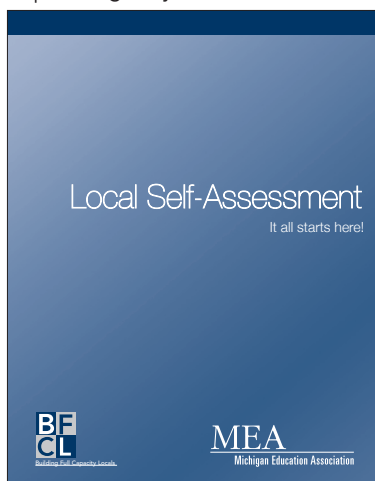
Michigan Education Association

Dear Local Leader,

One of the indicators of a full capacity local is long-range planning. Without planning, the tendency of local leaders is to dive into a swirl of various activities and spend a lot of time putting out fires with no real direction or goals in mind. A local with a long-range plan is a local where the leaders and members have a common vision and mission and are working toward the same goals. It is a local that has the organizational stability to effectively conduct business, meet the needs of members, and enlist the support and participation of new members.

Many people see long-range planning as an abstract, intimidating and enormously time-consuming process, but it doesn't have to be. What follows is a plan for making the long-range planning process relatively short, meaningful, and most importantly, valuable and relevant to your local. It is designed specifically for local leaders with limited time, resources and manpower.

Though the planning process outlined in the following pages has been abbreviated, it may still be more than you are prepared to take on. Don't let that stop you from adapting the contents to fit your local's specific needs. The important thing is that you recognize its importance and begin the process of planning for your local's future. There is no better time to start this than TODAY.



Prior to beginning the planning process, you will find it very helpful to familiarize yourself with the **BFCL Local Self-Assessment** booklet.

You can download the booklet from www.mea.org/BFCL under Local Funding Program, or request copies by contacting MEA Field Services.

More information and support is available by contacting Field Services at 800-292-1934, ext. 2941 or by visiting www.mea.org/BFCL.

*This booklet has been adapted from **MEA: Strategic Planning for Locals**, and its contents are the result of the efforts and talents of many current and past MEA UniServ directors—too numerous to name, but not too numerous to thank.*

PLANNING is good, but STRATEGIC PLANNING is better!

When people use the term “planning,” they frequently have in mind a procedure for deciding what they will do during the next few months or in some cases, the next year and selecting a course of action for accomplishing what they want to do.

This type of planning is actually called “program planning” and although it is good, it has limitations:

- It does not encourage planners to create a “vision” of what they would like their organization to look like.
- It accepts the status quo, in that it does not require planners to explore and to factor into their decisions how circumstances are likely to change in the future.
- It focuses the planners on isolated components of their organization, thereby reducing their ability to look at the total organization.

A more comprehensive and effective planning process is called “strategic planning.” This is a process through which an organization projects how it would like to look in the future (vision) and then makes decisions and designs plans that will shape and guide what it is, what it does, and why it does it. It’s planning that encourages participants to focus on what the true purpose (mission) of the organization is.

It takes more time to plan strategically, but it’s worth it. What follows is an outline for strategic planning. **Keep in mind that this should be adapted to fit the needs and limitations of your local.** You may choose to attempt something much simpler (program planning) to start. Whatever you do, be sure to include as many people as possible in the planning process. At the very least, it is recommended that you include all of the elected and appointed leaders in your local.

Remember, any planning is better than no planning at all!

The Strategic Planning Process—8 Simple Steps

1. Identify your association’s purpose—mission.
2. Identify the forces that affect how your association operates.
3. Identify and analyze your association’s strengths and weaknesses.
*The **BFCL Self-Assessment** is a quick and easy tool for doing this.*
4. Create a vision for your local, i.e., its desired future state.
5. Develop a series of realistic objectives and related goals that will help your local achieve its mission.
6. Solicit member input and support for your mission, objectives and goals.
7. Develop and implement action plans that identify the programs, materials and resources that will be necessary to meet the goals and objectives.
8. Measure your success. Assess and modify your plan as needed.

Planning to Plan

WARNING: Do NOT attempt strategic planning alone!

Strategic planning takes some preparation—you actually have to plan in order to plan! If you make some decisions and address some issues ahead of time, you will find that not only will you need fewer planning meetings, but your meetings will run more smoothly and be a lot more meaningful for all participants.

Consider the following before you have your first planning meeting:

1. Who will serve as members of the planning group? Try to include a wide range of representatives from the leadership and general membership.
2. Where will your meeting be held? Will you set all meeting dates in advance? How long will meetings last?
3. What will be on the agenda for the first meeting?
4. How will each member of the group get ideas on the agenda?
5. Who will chair the meeting? Will you use a facilitator? Who?
6. Who will record, prepare and distribute minutes?
7. How will you ensure that everyone in the group has input?
8. How will the group make decisions and resolve conflicts?
9. What kinds of association-related materials and information will be needed?
10. What technique(s) will you use to solicit the input of others (e.g., surveys, BFCL Self-Assessment, focus groups)? Note: Getting input from others is VERY important and should be done PRIOR to beginning the formal planning process.

The Strategic Planning Process: Step-by-Step

Now that you have your planning group together and have collected input from your association's elected and appointed leaders and members, it's time to get the strategic planning process underway. There are **8 steps** in the planning process, and what follows is a step-by-step guide through the process. The number of meetings you will need to have will vary and will depend upon a number of factors.

Again, if you are short on time, feel free to adapt the process to fit the needs of your association.

Step 1: Identify your association's mission.

The purpose of this activity is for the planning group to determine what the mission—the purpose—of the association is. The mission statement will serve as a framework for the remainder of the strategic planning process.

The best mission statements are written in plain speech with no flowery adjectives. They are short, clear and get to the heart of the organization's "reason for being."

An example of this type of mission statement is the mission of the MEA:

"To ensure that the education of our students and the working environments of our members are of the highest quality."

Use brainstorming techniques to solicit responses to the following questions. It is important that all in the group have the opportunity to express their ideas. Comments can be recorded on a flip chart.

1. Why has our association been successful?
2. What is the main business (reason for being) of our association?
3. What makes our association unique, distinctive?

Next, ask each member in the group to write a short statement describing, from his/her perspective, the association's mission and purpose. Statements should be **as specific as possible and focus on the needs of the members served by the association**. Suggest that members focus on the following questions:

1. What functions does/should the association perform?
2. For whom does/should the association perform these functions?
3. How should the association perform these functions?
4. What should be the association's priorities?

After the members have written their draft mission statements, let every member review them. Then have the group select one, which through discussion and rewriting, will be modified to reflect a mission and purpose with which all members of the group agree.

Step 2: Identify the forces that affect the operation of your association.

The purpose of this activity is for the planning group to identify the social trends and other forces (e.g., institutions, political forces, organization) that the association presently encounters or will encounter during the foreseeable future. It will also allow the group to discuss how the association should take advantage of the opportunities and overcome the threats presented.

The checklist on the next page identifies three categories for examining and analyzing the trends and forces that exist within the association's external environment and affect its ability to operate.

Make copies of the checklist for distribution to each group member and allow time for completion.

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After completing the checklist, lead the group through a discussion of the following questions in relation to each relevant institution, force, and trend (Record key points on a flip chart.):

1. Which demands are the trend or force (e.g., school board, state association, Legislature) placing on the association?
2. How does the association presently respond to these demands?
3. Which demands does the group expect this trend or force to make on the association during the next 2 to 5 years?
4. If the association took no action to change, how might it respond to these demands in the future?
5. How would we like the association to be able to respond to these demands during the next 2 to 5 years?

Forces Affecting Your Association

Place a check mark in the appropriate column indicating whether the planning group views the cited factor as an OPPORTUNITY or a THREAT.

	OPPORTUNITY	THREAT
SOCIAL & POLITICAL TRENDS		
State ed. reform initiatives	<input type="checkbox"/>	<input type="checkbox"/>
Local ed. reform initiatives	<input type="checkbox"/>	<input type="checkbox"/>
Site-based decisionmaking initiatives	<input type="checkbox"/>	<input type="checkbox"/>
Magnet school plans	<input type="checkbox"/>	<input type="checkbox"/>
Local attitudes toward education	<input type="checkbox"/>	<input type="checkbox"/>
Local attitudes toward teachers	<input type="checkbox"/>	<input type="checkbox"/>
Local attitudes toward the association (image)	<input type="checkbox"/>	<input type="checkbox"/>
Shifts in local demographics	<input type="checkbox"/>	<input type="checkbox"/>
REVENUE ISSUES & TRENDS		
Community millage support	<input type="checkbox"/>	<input type="checkbox"/>
Association salary/benefits compared to like occupations in community	<input type="checkbox"/>	<input type="checkbox"/>
Community economic conditions	<input type="checkbox"/>	<input type="checkbox"/>
Community millage effort	<input type="checkbox"/>	<input type="checkbox"/>
Availability of state funding	<input type="checkbox"/>	<input type="checkbox"/>
COMMUNITY & SUPPORT		
Relations with the local press	<input type="checkbox"/>	<input type="checkbox"/>
Relations with local politicians	<input type="checkbox"/>	<input type="checkbox"/>
Relations with the local business community	<input type="checkbox"/>	<input type="checkbox"/>
Relations with other labor groups	<input type="checkbox"/>	<input type="checkbox"/>
Relations with parent groups	<input type="checkbox"/>	<input type="checkbox"/>
Relations with the MEA	<input type="checkbox"/>	<input type="checkbox"/>
Local education-related forums	<input type="checkbox"/>	<input type="checkbox"/>
OTHER ISSUES & TRENDS		

Step 3: Identify and analyze your association's strengths and weaknesses.

The purpose of this activity is to provide the planning group with the information it will need to identify the association's strengths and weaknesses. The **BFCL Self-Assessment** is a very good tool to use for this. You can download copies from www.mea.org/BFCL under Local Funding Program or request copies by contacting MEA. To save time, you can distribute copies to group members to complete prior to the meeting. You should also provide the group with copies of any other input that you have gotten from members prior to beginning the planning process.

After the members individually assess the association, lead a discussion that focuses on identifying strengths that the association has that are critical to its success (Key points can be recorded on a flip chart.).

Move on to identify those weaknesses that group members believe must be improved. To help facilitate this discussion, divide the list into two categories:

1. Areas in which improvement is critical
2. Areas in which improvement would be nice

Ask the group to discuss how the items that were designated as weaknesses would look after they were improved.

Step 4: Identify the desired, future state—the vision—of your association.

The purpose of this step is to provide the group with an opportunity to describe how they would like the association to look in the future—to develop a vision of what it will look like in five years.

The discussion will build on what took place in Step 3 and should focus on the following question:

- **If you could change things about the association, what would they be and how would each look after the changes had been made?**

Get the group to narrow down the proposed areas of change to 3 to 4 items that all agree would be essential to the desired, future state of the association.

Write a statement that describes the desired, future state of the association with which all members of the group agree. This is your association's vision.

With the vision in mind, hold a discussion focused on the following question:

- **What must we do differently to achieve the type of association we want?**

Step 5: Develop a series of realistic objectives and related goals that will help your association achieve its mission.

The purpose of this step is to develop a series of objectives and related goals that, if achieved, would produce the desired state of the association (fulfill the vision).

An objective is simply a statement that outlines one or more broad, general aims of the association. A goal is a statement describing the specific targets to be reached on the way to achieving an objective. The best goals are simple, specific and designed to achieve an objective.

Here's an example of an objective and the goals that will help achieve it.

Objective:	To increase the visibility and enhance the significance of the association with its members and throughout the community.
Goals:	To develop and implement an effective internal communications plan.
	To develop and implement an effective external public relations program.
	To develop and implement a program designed to induct new members into the association.

When determining what your association's objectives should be, refer to the earlier drafted mission statement; the list of strengths, weaknesses, opportunities, and threats; and the agreed upon vision. Encourage the group to generate a list of ideas, and then select the three or four most important objectives. If prioritizing becomes difficult, try getting the group to assign each objective on the list to one of the following categories:

- a. must have
- b. would be nice to have
- c. a luxury

Make sure that there is agreement in the group on the most important objectives. Once the objectives are agreed upon, it is time to set some goals in order to achieve each one.

Start the discussion by selecting one of the agreed upon objectives and asking:

■ What specific actions must be taken in order to accomplish this objective?

There will probably be several (if not more) goals listed under each objective.

Step 6: Solicit member input and support for the mission, objectives, and goals.

The purpose of this step is to report to the membership about the direction that the leaders propose to guide the association.

However, you need to do more than just inform members. You need to solicit their input and have a plan to accommodate changes or adjustments in the strategic plan, if necessary. This step is very important because it creates a sense of member involvement and ownership; it ensures that the leaders have charted a course that members will support; and it generates interest in what the association is doing for its members.

The planning group should decide how to share information with members. This could include a general membership meeting, or individual building meetings, or using the association newsletter or email to convey the information.

Step 7: Develop and implement action plans to accomplish your goals.

The purpose of this step is to identify the specific steps that must be taken to accomplish each of the goals. The most effective way to do this is to have planning group members divide up and develop tentative action plans for each goal. These plans are tentative because they need to be reviewed by the entire group to determine whether or not the plans are workable, realistic, and affordable.

Every goal should have an action plan that should include steps to be taken, people responsible, dates, costs, etc.

Once group members have action plans for every goal, the group as a whole must review all plans and associated costs. Provide copies of all action plans to all members and give them an opportunity to question the rationale underlying proposed action steps or to explain the reasons for them.

To help keep the discussion focused, ask:

■ Will this action plan/step promote the accomplishment of the goal?

It is important to note that there is an enormous wealth of resources and staff in place at MEA to assist you in the development of programs and materials and to provide training. In addition, there may also be some financial assistance available to support specific components of your plan through your coordinating council or zone. Your UniServ director, coordinating council chair, region president and MEA board members from your region are great resources to contact regarding this.

Volunteers will be needed to accomplish the goals. Get your members interested in what the future offers and what they can do to be a part of the positive changes that will occur as you strive to achieve your goals. Encourage and support member involvement and be sure to publicize and promote what you are doing.

Step 8: Measure your success.

It is very important that you have a system in place for assessing, modifying and measuring the success of your local's strategic plan. A year-end member survey, revisiting the BFCL Self-Assessment and/or member focus groups might be some ways to get the feedback you need. Assessment and modification are important parts of the process and will ensure that your plan will continue to have meaning and relevance to your members.

You've Got Connections!

The MEA Communications and Public Policy Department is a group of talented, creative and dedicated people who want to help you develop and implement a successful local communications plan.

If you need it, just ask!

- Message development and management tailored to your association's needs.
- Targeted materials designed to help you connect with your new members.
- Crisis PR—we will help you develop a crisis strategy to communicate with members, the community and the media.
- Assorted local materials may be created through MEA Creative Projects. From business cards to placemats to flyers, our award-winning graphic artists serve your design needs free of cost and our in-house print shop features low prices and a large selection of stock. Request a job through your local field office.

MEA

Communications and Public Policy
800-292-1934



MEA

Michigan Education Association

www.mea.org

1216 Kendale Blvd., PO Box 2573, East Lansing, MI 48826-2573

*The mission of the MEA is to ensure that the education of our students and
the working environments of our members are of the highest quality.*

