

FACILITATOR'S GUIDE

TO

STRATEGIC PLANNING FOR NSPRA CHAPTERS

A successful chapter is one that meets the needs of its members. But, how to you do that? Experience has demonstrated that chapters which engage in strategic planning every two or three years will meet the needs of their members and prosper.

Strategic planning for a chapter is very similar to the four-step process that we all engage in when planning a public relations/communications effort for our employer—Research-Planning-Carrying out the Plan-Evaluation. Much of the strategic planning can be done in a one-day meeting of the chapter's officers.

The first step in strategic planning is making the commitment to do it. Indicators that strategic planning is needed are few, poorly-attended meetings and a general lack of enthusiasm for chapter activities. This is frequently the result of planning isolated activities, rather than helping chapter members improve or learn new skills that have a pay-off in their daily responsibilities. If this describes conditions in your chapter, it's time to make the commitment to strategic planning.

Research

- Prior to the leadership's strategic planning session, gather some data about the chapter's last three or four years:
 - What is the membership trend? New members? Renewal rate? Percent who are NSPRA members?
 - What have been the chapter's most successful activities from both attendance and financial viewpoints?
 - What is the geographical distribution of chapter members?
 - What types of pr/communication responsibilities do various members have?
 - Does location or length of activities seem to make a difference in attendance?
 - Are there other data that may be useful in assessing member preferences?
- Develop a brief survey form and send it to chapter members—and to those who are no longer chapter members but still work in the chapter area. A sample survey, which you can modify, can be found on the last page of this brochure.

Planning

- Set a convenient date and location for the chapter leadership to meet. A week or two prior to the meeting, send copies of the research information that has been developed, including survey results, so participants can begin thinking about its implications.
- Begin the planning session by discussing the research information that has been developed and its possible implications for the chapter.
- Based on the implications of the research data, discuss chapter goals (i.e., why we exist; what we want to accomplish). Some chapters have included goals in their Bylaws. If goals were formulated many years ago, brainstorm their relevance to the current membership and times. If goals have not been stated or are too general, brainstorm what the chapter's goals should be. After developing a list of potential goals, reach agreement on the four or five that are most important to help meet member goals and interests.

Goals should be stated clearly and in a way that can be evaluated. For instance:

- Conduct programs that will help members improve two-way communication between their school district and its patrons.
- Over a two-year period, increase chapter membership by 40% and members' membership in NSPRA by 30%.

Make sure the chapter goals will help members achieve the personal goals they have expressed on the survey form, and that the chapter will be able to offer programs/activities that will lead to achieving those goals.

- Based upon the goals the leadership has agreed upon, consider types of programs/activities and the priority for carrying them out, timing, preparation required, cost.

Draft a chapter program/activity calendar for the next two years. Consider programs that:

- Respond to members needs as expressed in the survey
- Will achieve the agreed-upon chapter goals
- Build upon popular and successful chapter activities in the past
- Engender enthusiasm on the part of the leadership group

Based upon the member survey and prior discussions, consider timing, location and cost factors. Reach agreement on who will chair and who will assist in planning the specifics of the first chapter activity. As part of that activity, make time for explaining chapter goals to members and get volunteers to help amend or plan future programs.

Discuss membership/program marketing. With new or updated goals, and programs that respond to the needs of members who responded to the chapter survey, consider how to increase chapter membership and attendance at planned programs.

Are there state or regional directories that will yield names of potential chapter members?

Can we create a contact referral form that chapter members can fill out with the name, address and title of colleagues they have invited to become chapter members?

How should the chapter take advantage of the NSPRA membership incentive program to get chapter members to also become NSPRA members?

What does the member survey tell us about planning, locating and publicizing chapter programs/activities?

What is the most desirable timeline for program marketing materials?

Program Implementation

A member of the chapter leadership cadre should coordinate the planning of each chapter activity, but should be assisted by several other members who can assist with the planning responsibilities.

Determine at the strategic planning session which chapter leader will chair which programs. Get additional volunteers to help with the program planning. The leadership group should identify a general timeline for each activity to ensure that planning, reservations, marketing, and other details are taken care of in a timely and professional manner.

Evaluation

Discuss at the strategic planning session how each activity and how progress toward the chapter goals will be evaluated.

Make sure that part of the responsibility for planning each event is the preparation of an evaluation instrument. Participants should be asked about the extent to which the program met their needs; the quality of the presentations; and the facilities, location, food, etc.

How will the chapter leadership evaluate its success in reaching chapter goals?

How will program and goal evaluations be used to modify future chapter programs and plans?

State Chapter Member Questionnaire

The State Chapter leadership will meet (date) to develop a two-to-three-year plan for chapter activities. For this planning to be effective, we need to determine how best the chapter can serve each of its members. Please complete and mail this questionnaire by (date) to:

1. What is your job title? _____
2. How many years have you been a chapter member? _____ An NSPRA member? _____
3. Date you last attended a chapter event? _____
4. Was that program worth your time and expense? Yes _____ No _____
5. Please check the following topics that would be of interest to you:
 - _____ Developing PR/communication plans
 - _____ Providing PR counsel to the superintendent, staff and governing board
 - _____ Developing crisis communication plans
 - _____ Producing award-winning publications that are read
 - _____ Developing school-business partnerships
 - _____ Dealing with controversy
 - _____ Developing a school foundation
 - _____ Winning finance campaigns
 - _____ Designing/updating school/district websites
 - _____ Using cable television as an information vehicle
 - _____ _____
 - _____ _____
 - _____ _____
6. What's your preference for length of chapter programs?
 - _____ Half-day _____ Full-day _____ Two half-days with overnight
7. How many good chapter meetings would you attend in a year? _____
8. How many hours are you willing to travel to a chapter event? _____
9. Please give us any other information that would help us make chapter events meet your needs:

GOOD CHAPTER BUSINESS PRACTICES

Chapters of the National School Public Relations Association vary in size from one dozen to several hundred members. Some are newly formed; others have existed for decades. Because of these variables, there is no “one way” for a chapter to conduct its business functions. But, there are some general principles that it is wise to follow, and these may be helpful to new chapters or inexperienced chapter officers.

NSPRA chapters are not-for-profit units of the National School Public Relations Association and are part of a group exemption issued by the Internal Revenue Service. This means that chapter earnings are exempt from federal and state income taxes (if any) and, depending on state laws, the chapter may not have to pay state sales tax on its purchases. To remain a chapter in good standing both with NSPRA and the IRS, chapters must:

- Follow NSPRA policies 260.1, 260.2, and 260.3. Copies are provided and explained at the Chapter Officers meeting at the NSPRA annual seminar or are available from NSPRA.. Requirements include submitting an annual chapter cash flow by October 15 each year.
- Have a fiscal year the same as NSPRA’s, September 1 through August 31.
- Have an Employer Identification Number (EIN) issued by the IRS, even through most chapters don’t have any employees. NSPRA obtains an EIN for each chapter when it is chartered. The major use of the EIN is to identify chapter bank accounts and securities.

Chapter funds should be kept in a chapter bank account. If possible, select a bank that has branches throughout the chapter area so that, regardless of who the chapter treasurer may be, the bank account can continue. Use the chapter’s EIN for identification of checking and savings accounts, certificates of deposit, etc. Some banks pay interest on balances or waive fees for non-profit organizations. Deposit any funds the chapter receives (membership dues, program fees) as quickly as possible (within one week). Although most people are totally honest, it’s a good business practice to require two signatures on chapter checks written for over a certain amount (\$100 or \$500).

Plan your chapter year and budget. Soon after new chapter officers are elected, they should meet to plan chapter activities for the next year (see the Strategic Planning Guide). As part of the strategic planning process, you must consider income and expenses. That means a budget. To create a budget:

- Estimate sources of chapter income—membership dues, program registration fees, contest fees, etc.
- Estimate chapter expenses—printing, postage, facility rentals, meals, bank charges, etc.

- Tailor expenses to realistic estimates of income. The chapter will not be able to exist if it regularly spends more than it takes in—unless it has a large bank balance that chapter officers agree they will reduce to cover deficit spending.

Keep good financial records. A chapter treasurer should deposit funds promptly and save all deposit slips, noting the sources of funds. No checks should be written without a record of the expenditure (bills from hotels, printers, post office receipts for stamps, etc.). Keep a record of all income and expenditures, either by hand or on a computer spreadsheet.

Give a treasurer’s report at each chapter meeting. The chapter treasurer should prepare and distribute a financial report at each chapter meeting, showing the receipts and expenses since the last report, or for the year-to-date. There should be opportunities for members to ask any questions they may have about the financial report.

Have the chapter books audited each year. The chapter’s fiscal year ends August 31. The treasurer should complete the bookkeeping and submit the financial records for an audit. This audit is as much for the treasurer’s protection as the members’ and it could be done by another officer or member of the chapter or by an experienced accountant. The treasurer’s records should be turned over to the auditor with the books, bank statements, deposits and cancelled checks (if the bank returns them).

Keep a portfolio of important financial documents. In most chapters, officers change each year. This gives more people leadership opportunities, but it also may make recordkeeping difficult. The treasurer should establish a portfolio of important records (checkbooks and deposit slips, bank account numbers, EIN and other records from the Internal Revenue Service, annual chapter cash flow reports) and pass them on to their successor.

Ask for advice. For some people, being chapter treasurer is “no sweat.” For others, it’s a whole new world. If you’re in the latter category and need advice, ask—a knowledgeable predecessor, the treasurer of a nearby chapter, or the NSPRA office (301-519-0496). It’s a lot easier to ask early on than to be faced with a mess at the end of the year.