



The Leadership Letter

Strategic Planning—Whose Job Is it Anyway?

Strategic planning is a major endeavor, the results of which will have a significant impact on an organization’s future. As such, it is important that the process involve different types of people—and many of them. A variety of skill sets, mindsets, and areas of expertise will be invaluable to the strategic planning effort; and using the right people at the right time will help ensure success. So, who do you involve, and how and when do you bring them into the process?

The Board

The ultimate responsibility for an organization rests squarely on the shoulders of its Board. Without the board’s input and final approval, strategic planning cannot move forward. In addition to periodic planning, the board should constantly engage in strategic planning at every board meeting and take a proactive approach to addressing potential business items, whether urgent or not.

The Chief Executive

The Chief Executive’s role is to take charge and manage the planning process. This often visionary person puts forth detailed ideas and proposals for the board’s approval. The chief executive is frequently responsible for initiating strategic planning and manages the process by coordinating resources, board members, staff, and other collaborators. Once the plan is created, the chief executive then oversees its execution.

The Staff

The input, perspective, and support of an organization’s staff are vital to the strategic planning process. Due to their firsthand experience with the everyday processes of the organization, staff members have valuable insights to offer.

Staff provide the board and chief executive with research to aid in planning, and they often organize the meetings that bring everyone together. Once a plan is formed, staff are responsible for making it a reality.

The Consultant

When major change is in the works, a consultant or facilitator can be very helpful in that he or she can objectively guide everyone through the planning process. A consultant or facilitator directs the process and leads the meetings, making sure that all of the bases are covered. This person may help identify key issues that need to be addressed, but at no point imposes his or her own opinions.

The Member

It is important to always remember who may be most directly affected by the outcomes of strategic planning: members. Member input can help planners remain cognizant of the fact that their decisions have real consequences for real people. As planning meetings are internal exercises where confidential information and ideas may be exchanged, they might not be the ideal arena for member participation. Instead, focus groups and surveys can be excellent sources of member feedback.

Strategic planning is a huge responsibility for those involved, as the outcome will determine the organization’s future. Involving many different people—and their varied skills and perspectives—helps ensure that the end result is one that will lead an organization to success.

Source: “Roles in Strategic Planning,” BoardSource, <<http://www.boardsource.org/Knowledge.asp?ID=1.321>>, accessed on April 23, 2012.

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Don't file it away and forget about it...

Put Your Strategic Plan to Work

After working so hard to develop a strategic plan, it would be a shame to let it sit untouched, collecting dust in a filing cabinet. So often, though, this is exactly what happens to an organization's strategic plan. If this is the case for your organization, think about why that plan has been abandoned. Is it so old that the Board and staff don't even know it exists? Or, is it current, but no one really knows what to do with it?

Whether you're re-vamping or just recommitting to your strategic plan, the most important thing to keep in mind is that it should provide the foundation for all decision making—short-term and long-term—within your organization. A useful strategic plan is constantly referenced as a go-to source for guidance when making decisions about program, funding, and external communications. A useful strategic plan should:

1. **Provide clear direction and organizational focus.** With clarity, leaders can make decisions with ease in times of crisis; without it, your organization may stumble.
2. **Prevent "mission creep,"** the result of trying to be everything to everyone. A good strategic plan will help an organization know when to say "no" to a

project or program that might steal energy and resources away from its stated mission and goals.

3. **Clarify your mission.** In your strategic plan, your mission should be clearly stated and should answer these questions:
 - What is our purpose?
 - Who are our constituents?
 - What is our business?
 - What values guide us?
 - What makes us unique?
4. **Help you do what you do best.** What sets you apart from the competition? Figure that out, and make it a key talking point during strategic planning discussions.
5. **Make difficult choices easier.** Develop guidelines for choosing between alternatives. Coming to a consensus is easier when everyone agrees on the same general decision-making criteria.

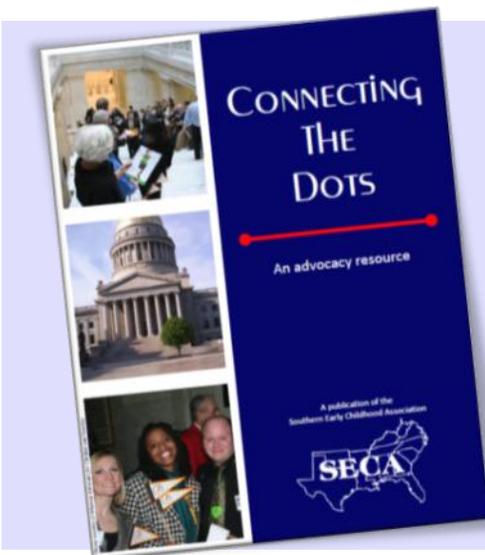
After considering the above points, your end result should be a strategic plan that is useful to your organization. Then, it is up to the board and staff to actually put the plan to use. The board should refer to the plan at every meeting, and the plan should play a role in all major decisions. Staff should use the plan when creating action plans.



To make sure that happens, consider holding an annual retreat to assess in depth your progress in implementing the plan. Also, take a look at any assumptions that were made when the plan was created—assumptions about the economy, the political climate, or any other factors that may have changed—to see if those assumptions still apply or if you need to make some adjustments.

In the end, the actual plan document is just ink on paper. It is how your organization utilizes the plan that ultimately determines its success.

Source: Bob Greene, "Do You Use Your Strategic Plan?" <http://www.tsne.org/site/c.ghLUK3PCLoF/b.5609537/k.C547/Consultants_Corner_Do_You_Use_Your_Nonprofits_Strategic_Plan.htm>, accessed on April 22, 2012.



Connecting the Dots An advocacy resource from SECA

The terms "public policy" and "advocacy" strike fear in the hearts of many early childhood advocates. If you're worried about getting started as an advocate, SECA can help!

Connecting the Dots explains why you are in an ideal position to advocate for children, how you can get started, and how you can use SECA resources in the process.

Find **Connecting the Dots** on the Public Policy page of the SECA website at

<http://www.southernearlychildhood.org/policy.php>.

Do You Know About the SECA Board Resources Page?

Find board rosters, meeting minutes, and so much more on the SECA Board Resources Page. Go to http://www.southernearlychildhood.org/seca_board_resources.php to log in. If you serve on a SECA affiliate board and do not have a password, contact your SECA Board Representative or the SECA office at 1-800-305-7322. To find your SECA Board Representative, go to <http://www.southernearlychildhood.org/leadership.php>.



Five Elements of a Successful Board Retreat

- 1 Clear goals** that lead to specific, practical outcomes. Know *exactly* what issues you need to discuss and *exactly* what you want to accomplish.
- 2 A focused agenda** that makes the best possible use of the Board's time together. Prepare ahead of time by identifying key issues that the board should address.
- 3 Forward movement** at a **comfortable pace**, often controlled by the Chairperson or President or a facilitator. The "right" pace is one that allows the board plenty of time to discuss each issue and to move on before the topic becomes tiresome.
- 4 A courteous yet candid atmosphere** where board members express their ideas and opinions freely and resolve disagreements productively.
- 5 A flexible venue** that allows for informal interaction. Encourage board members to get to know each other and find out how they can contribute to and benefit from the retreat and their board service. Personal reward and satisfaction are big motivators.

Source: "The Need for Board Retreats," SCORE, <<http://www.scoreknox.org/library/retreat.htm>>, accessed on April 26, 2012.

Questions to Ask When Planning a Board Retreat

Why?

Even if the goals are the same each year, your Board can still benefit from a retreat. A successful retreat gives board members the opportunity to:

- Participate in in-depth planning and team-building that you just can't squeeze into a regular board meeting.
- Gather in a more informal environment to engage in creative strategic planning.
- Build relationships between themselves and staff or reconnect after being divided over a critical issue.
- Assess themselves as a board.

Who?

If the board is gathering to discuss sensitive or confidential matters, only board members (and upper-level staff, if appropriate) should attend—no outsiders. But, if the goal is to have a broad discussion about the future of the organization, including other constituencies such as donors, members, community leaders, and volunteers may prove beneficial. Also, according to governance consultant Sandra Hughes, every retreat needs an objective facilitator to guide the proceedings.

When and Where?

Always ask board members and other participants for their input on the best date and location. It won't be easy to come to a consensus, but

good attendance is crucial. Aim for 100% attendance—anything below 80% is unacceptable. One-and-a-half to two days is an ideal length for a retreat. The environment should be conducive to accomplishing your goals and the location should be far enough away from home and work to eliminate the temptation to make a "quick run" home or to the office.

How?

Your retreat should have a clear focus. Once you determine the focus, you must then decide what types of activities will help the board meet its goals. An experienced facilitator can be very helpful at this stage of planning. Also, consider the seating arrangement that will work best for the size of your group and the type of environment you wish to create. Take breaks and allow for "down time" so board members can socialize with one another.

What Next?

Save any voting and "executive" or closed meetings for after the retreat. Retreats exist to encourage *everyone* to participate and think creatively. The pressure of a vote or the exclusive nature of a closed session or meeting can ruin that open atmosphere. Consider a post-retreat evaluation to assess the retreat and to aid in planning future retreats.

Source: Sandra R. Hughes, *To Go Forward, Retreat!*, 1999, <http://www.boardsource.org/dl.asp?document_id=520>, accessed on April 26, 2012.

Board Orientation Resources from SECA



Did you know that SECA has free Board Training Modules available on the Leadership Resources Page of our website? There are 9 different modules in both PDF and Microsoft® PowerPoint format. Modules include:

- Module 1: Association & Non-Profit Organization Basics
- Module 2: Legal Aspects of Associations and Non-Profits
- Module 3: Articles of Incorporation and Association Bylaws
- Module 4: Association Personnel—The Executive Director
- Module 5A: The Board of Directors: Structure and Activities
- Module 5B: The Board of Directors: Recruitment, Training, and Effectiveness

- Module 6: Association Employees and Volunteers
- Module 7: Non-Profit Association Tax Compliance
- Module 8: Non-Profit Association Finances and Fundraising
- Module 9: Non-Profit Organizations and Political Activities

Go to http://www.southernearlychildhood.org/leadership_pdf.php#training to download the training modules.

Other Resources

The Board Manual: An Orientation and Resource Tool, from the *Governance Series*

(BoardSource, 2007), this article includes a contents checklist and tips for creating a useful—and user-friendly—board manual. Find it online at <http://www.boardsource.org/Knowledge.asp?ID=3.390>.

Free Management Library has a collection of resources for orienting and training board members. Included are resources for new-member orientation as well as for ongoing board education. Go to <http://managementhelp.org/boards/index.htm#anchor1341866>.



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The Southern Early Childhood Association (SECA) is committed to improving the quality of care and education for young children and their families through advocacy and professional development.

The Southern Early Childhood Association (SECA) is a regional organization committed to promoting quality care and education for young children and their families. SECA is committed to providing leadership and support to individuals and groups by:

- *Enhancing the quality of young children's lives through early childhood care and education.*
- *Supporting families in their roles of caring for their children.*
- *Fostering the professional growth and status of individuals working with young children and their families.*