

The Planning Process

The Presidents Roundtable has charted a course for bringing greater visibility in the higher education arena to the interests of African American leaders and students in community colleges. Members who participated in PRT's Strategic Planning Retreat in the summer of 2015 produced four strategic directions. The intent is to provide a clearer vision for what PRT can accomplish, to strengthen it from the inside out and to make it a more member-centric organization. For the next two-three years PRT will direct its energies and resources to:

- **STRENGTHEN OPERATIONS, EXPAND INFRASTRUCTURE AND FOCUS ON SUSTAINABILITY**
- **RENEW FOCUS ON MEMBER BENEFITS AND ENGAGEMENT**
- **FURTHER DEVELOP PROGRAM STRUCTURES**
- **SHARPEN ITS BRAND AND INCREASE MARKETING AND VISIBILITY**

Prior to the membership meeting in October 2015, these strategic directions and associated objectives were distributed in a survey to the entire membership for feedback. Sixty-five percent of the PRT membership responded. During the meeting, attendees organized into work teams to determine the action steps to be taken over the few years for each of these strategic directions. A draft of this plan was vetted with the PRT membership who affirmed its contents with only minor adjustments. This Operational Plan is the result.

Members who participated in the June 2015 Retreat that laid the foundation for this plan were: Andrew Jones, Charlene Dukes, Charlene Newkirk, Marlon Hall, Tom Coley, Jabari Simama, Linda Gates-Black, Quintin Bullock, Kathryn Jeffrey, Regina Stanback-Stroud and Sylvia Jenkins.

Members who worked at the October 2015 meeting to define the Action Steps to be taken in each strategic direction were:

- **Infrastructure and Sustainability:** Andrew Jones, Kirk Curry, Walter Tobin
- **Member Benefits and Engagement:** Audre Levy, Marshall Washington, Jabari Simama
- **Program Structures:** Charlene Newkirk, Kirk Nooks, Ed Bush, Merrill Irving, Stanford Simmons, Marshall Washington
- **Branding and Visibility:** Charlene Dukes, Jennifer Wimbush, Sharon Blackman

The spirit of commitment, determination, perseverance, teamwork and adaptability exhibited throughout the strategic planning process will fuel PRT's advancement as members work toward its desired future.

Consulting support for the entire strategic planning process and production of this Plan was provided by Naomi Booker and Associates of Baltimore, Maryland.

Objectives:

1.1 Focus keenly on infrastructure and sustainability to include partnering with an Association Management Company to create a stable foundation for long-term growth

1.1 Action Steps	Timeframes
1.1.1 PRT joins ASAE (American Society of Association Executives to access its resources and best practices for infrastructure and sustainability	By Jun 2016
1.1.2 Solicit an AMC:	By Mar 2016
1.1.2.1 Establish solicitation work schedule and key decision points	
1.1.2.2 Finalize AMC Request for Information	
1.1.2.3 Identify AMCs to receive RFI	
1.1.2.4 Issue RFI and receive AMC responses	
1.1.3 Select an AMC:	By Apr 2016
1.1.3.1 AMC Selection Team reviews responses and determines which AMCs will be interviewed as potential candidates	
1.1.3.2 AMC Selection Team interviews candidates and decides which will receive RFP	
1.1.3.3 AMC Selection Team presents progress update at membership meeting	By Apr 2016
1.1.3.4 AMC Selection Team issues RFP, reviews proposals received and informs Executive Committee of final candidates with rationale and consequences.	By May 2016
1.1.3.5 AMC Selection Team makes recommendation to the Executive Committee and negotiates contract with selected AMC firm. Finalize AMC contract, including payment plan, length of probationary period and criteria for assessing performance.	By June 2016
1.1.4 Engage and AMC for a probationary period	By July 2016
1.1.4.1 AMC begins work not later than July 1, 2016	
1.1.4.2 AMC arranges logistics for PRT October meeting, Lakin Institute and MMI Institute	
1.1.4.3 AMC makes presentation on priority topics to Executive Committee within 75 days of beginning work	

1.2 Increase accountability and collaboration within the leadership. Provide regular updates to the membership beginning with each incoming Executive Committee’s state of the organization and proposed priorities for the duration of their term.

1.2 Action Steps	Timeframes
1.2.1 Incoming Executive Committee will prepare a “State of the Organization” assessment and identify its priorities for its term to distribute to the membership.	Starting Jan 2016 and by Sep 15 after each new term begins
1.2.2 Create and implement a transition plan to smooth the handoff between old and new Executive Committee leadership to include:	Starting Jun 2016 and after each new term begins
1.2.2.1 Budget review and assessment of Executive Committee effectiveness	
1.2.2.2 Updates on strategic objectives, standing committee operations, and outstanding deliverables	
1.2.2.3 Review of critical files	
1.2.2.4 Outstanding projects and issues with the AMC	

1.3 Restructure committees to reflect the strategic directions of PRT and the engagement of an AMC; formalize the involvement of PRT members. Update or amend By-laws and Constitution as needed.

1.3 Action Steps	Timeframes
1.3.1 Elaborate role and specific duties of new vice chair position	By Apr 2016
1.3.2 Specify committee charters, structures and roles. Indicate degree of autonomy, decision-making and reporting processes and interrelationships with other committees/work teams	By Dec 2016

1.4 Create an annual operating budget making explicit correlations between programs, membership dues, fee-based activities and sponsorships to ensure the financial viability of the organization

1.4 Action Steps	Timeframes
1.4.1 Develop 2015-2016 operating budget for the PRT. The budget would be actual revenue and expenses for July 1, 2015 through November 30, 2015 and projected for December 1, 2015 through June 30, 2016.	By Apr 2016
1.4.1.1 Reflect funds from all sources: membership dues, partnerships, grants, fundraisers, fee-based activities, sponsorships, entrepreneurial and intellectual property activities	
1.4.1.2 Reflect all expenses, including expense for an AMC for 6 months, Jan 1-June 30, 2016 Organize PRT Accounts Payable and Receivables by cost center or function; includes gathering draft budgets from each strategic direction team and active committee	
1.4.1.3 Revise PRT Membership Invoices/Dues Structure to analyze revenues based on membership levels	
1.4.2 Draft a projected budget for July 1, 2016-June 30, 2017	By Apr 2016

Strategic Direction 2

RENEW FOCUS ON MEMBER BENEFITS AND ENGAGEMENT.

Objectives

2.1 Develop high-visibility member engagement strategies based on the 2015 pre-retreat survey feedback

2.1 Action Steps		Timeframes
2.1.1	Identify and clarify the specific value of current benefits for all levels of PRT membership	By Apr 2016
2.1.2	Address gaps in member benefits for all levels of PRT membership in coordination with the Professional Development Leadership Committee. Refer to June 2015 retreat survey results and Summary Report. For example: 2.1.2.1 Access to legal consultant services (e.g. contract negotiations; helping to navigate troubled waters-- votes of no confidence, challenges with the board, separation agreements) 2.1.2.2 Access to a list of "experts" (e.g. individuals who are skilled in working with boards, shared governance, unions, fund raising) 2.1.2.3 Develop recognition programs to acknowledge years of service and years of PRT membership/involvement 2.1.2.4 Highlight the Honorary/ Emeritus category for presidents who have moved on or are retired	By Jun 2016
2.1.3	Simplify the membership fee structure to make it easier for members to understand their benefits based on their membership level. Coordinate with the Finance and Membership Committees.	By Aug 2016
2.1.4	Develop a private online member portal in coordination with the Communications Committee and AMC.	By Apr 2017
2.1.5	Develop targeted communication strategies to educate, attract and retain members. Work in coordination with Communications Committee and AMC and present to the Executive Committee.	By Sep 2016

2.2 Track data on existing and new members to implement data-informed membership recruitment and retention strategies in coordination with AMC

2.2 Action Steps		Timeframes
2.2.1	Select online membership management software with help of AMC. Identify information to be tracked and required reports. Implement an online member sign-up and renewal. Coordinate with the Treasurer and Finance Committee	By Dec 2016

2.2.2	Determine who has access to and data maintenance responsibilities for the membership management system	By Dec 2016
2.2.3	Identify critical communications and updates to the membership and assign responsibilities for issuing them	By Sep 2016

2.3 Increase membership in PRT and involvement of current members.

2.4 Action Steps		Timeframes
2.4.1	Propose a set of expectations for PRT members (e.g., attend one PRT membership meeting annually; serve on 1 committee or workgroup at least once in every 3-year cycle)	By Oct 2016
2.4.3	Vet list with 1-2 focus groups	By Dec 2016
2.4.4	Use focus group results to create formal statement of PRT Expectations of Members	By Mar 2017
2.4.5	Present for approval by the membership & begin to communicate expectations	By Apr 2017
2.4.6	Create system to track member participation. (May need to ask members to self report)	By May 2017
2.4.7	Run reports/review information on member participation	Annually starting Dec 2017
2.4.8	Create acknowledgements and recognitions for member engagement and participation	Annually starting Apr 2018 Meeting

Strategic Direction 3

FURTHER DEVELOP PROGRAM STRUCTURES

Objectives

3.1 Strengthen and systematize professional development for PRT members at each stage of their careers

3.1 Action Steps	Timeframes
3.1.1 Convene a Professional Development Leadership Committee reporting to the Executive Committee. Committee membership will include the Lakin Coordinator, MMI Coordinator, members and other volunteers. This committee will optimize programming and resources for cohesive and comprehensive professional development opportunities for members and Lakin Institute and MMI participants.	By Mar 2016
3.1.2 Conduct an annual assessment to identify professional development and leadership training needs of the membership. Communicate results to members within 90 days of completion.	Starting Jun 2016
3.1.3 Create various in-person and online programs for PRT meetings, and other times during the year; develop an annual schedule for all events (Membership, Lakin and MMI) and present to membership including: 3.1.3.1 Programs to be offered and descriptions 3.1.3.2 Budget for each program 3.1.3.3 Timing and approaches for promoting programs, i.e. email, website, phone trees 3.1.3.4 Survey distribution and feedback to membership 3.1.3.5 Coordinate with Membership Committee regarding Member Benefits	Starting Oct 2016
3.1.4 Design and administer a satisfaction survey of qualitative measures after every professional development session. Report results to Membership.	Ongoing

3.2 Strengthen Lakin Institute Program by implementing policies, processes and practices helps PRT grow and manage it effectively

3.2 Action Steps	Timeframes
3.2.1 Create a formal Lakin Committee, chaired by the Lakin Coordinator, including Lakin graduates and reporting to the Professional Development Leadership Committee	By Jun 2016
3.2.2 Articulate overall learning outcomes for the entire Lakin Program annually. Present to PDL Committee for approval by the membership at the April 2016 meeting	Starting Mar 2016
3.2.3 Create a more structured mentoring program to include: <ul style="list-style-type: none"> 3.2.3.1 Create and distribute a leadership plan to guide mentees and mentors and announce at 2016 Lakin Institute 3.2.3.2 A process to recruit, match and orient mentors 3.2.3.3 Require all Lakin mentees to develop a leadership plan that will be shared with their mentor and possibly their president once they complete the program 3.2.3.4 Implement an online system to submit and track leadership plans and mentor/mentee relationships 	By Jan 2017

3.3 Improve offerings of the Minority Male Initiative for students at all levels (Associate, Bachelors and Graduate) to stimulate students’ exposure to and interest in leadership roles in the community college arena and to increase involvement of presidents of PRT member institutions

3.3 Action Steps	Timeframes
3.3.1 Create a formal MMI Committee, chaired by the MMI Coordinator including representatives from NCBAAs and MMI participants and reporting to the Professional Development Leadership Committee	By Apr 2016
3.3.2 Articulate overall learning outcomes for the entire MMI Program	By Jun 2016
3.3.3 Identify specific learning outcomes for individual presentations within each institute	Starting Apr 2016
3.3.4 Present annual budget for MMI Institute to PDL Committee	Starting Apr 2016
3.3.5 Qualitatively and quantitatively assess the effectiveness of each institute and publish results	Starting Oct 2016
3.3.6 Review and assess the curriculum and career pathways for MMI students at all levels (Associates, Bachelors and Graduate degree seeking) to identify potential changes to MMI offerings. Present to PDL Committee and Lakin participants annually.	Starting Oct 2016

Strategic Direction 4

SHARPEN THE BRAND AND INCREASE MARKETING AND VISIBILITY

Objectives

4.1 Refresh PRT branding. Redesign the website and print materials to reflect the organization's unique value—past and future—and to highlight exclusive member benefits and features

4.1 Action Steps	Timeframes
4.1.1 Create an interim web-site that allows the PRT to continue its business and represents the professionalism expected by current and potential members	By Jun 2016
4.1.1.1 Identify a web design consultant to estimate costs, make recommendations for structuring the site and build an interim website that: <ul style="list-style-type: none">• Presents priority information on PRT• Has an updated design• Has a limited number of pages	
4.1.1.2 Develop a content plan and budget for migrating content, writing and approving content and regularly updating content on the site	
4.1.2 Rebrand PRT; review, clarify and refresh the image to communicate a 21st century view of PRT	Starting Apr 2016
4.1.2.1 Establish a Communications committee to identify and prioritize high-level branding and visibility needs and resources, including estimating how much the organization can afford to spend.	
4.1.2.2 Identify and speak with 3-4 firms regarding PRT's branding needs and budget constraints	
4.1.2.3 Develop and issue RFP to solicit proposals	
4.1.2.4 Review proposals and make recommendations to the Executive Committee to hire a firm to redesign the PRT brand to include print and electronic materials, website and a social media presence.	
4.1.2.5 Make recommendations to the Executive Committee for a longer term marketing strategy	
