

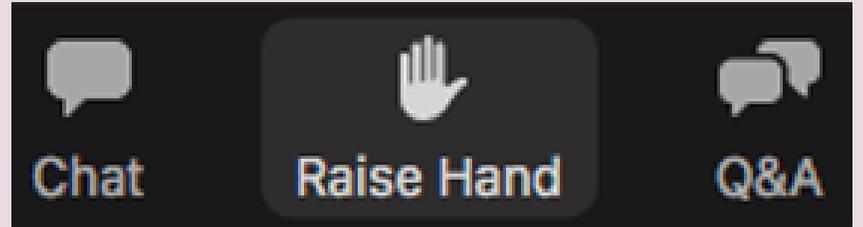
# Welcome!

**Audio is provided through your computer.** If you are experiencing difficulties, please contact the live chat facilitator.

**Your mic has been muted.** This keeps background noise down so that all participants can hear the content. We'll explain how to use chat to communicate.

**Source material will be made available.** You will receive a link with all research, tools, organizations and resources mentioned during tonight's workshop.

**This evening's session is being recorded.** You will receive a link to the playback in your inbox tomorrow morning.



**Have a comment?**

**Need help?**

**Want to ask a question?**

**Click these icons for support from the PFLAG team!**



PFLAG.ORG



# Charting the Path Forward

## Strategic Planning for PFLAG Chapters

General Housekeeping

# Your Presenters Tonight



**Eddy F (they/he)**  
Chapter Engagement Senior  
Coordinator



**Mackenzie H (they/them)**  
Senior Manager, Learning &  
Inclusion

Contact us at [training@pflag.org](mailto:training@pflag.org)

# Group Agreements

**This is a safe learning space:** Be honest about your feelings and thoughts and use “I” statements.

**Assume good intent:** Remember that you can learn from anyone, and we can all navigate disagreements with kindness.

**Respect the limited time we have today:** Keep questions and comments relevant and concise.

**Please silence/pause electronics.** Be present and avoid distractions. You deserve (and need) time to learn.

**You will receive one warning.** Biased, unkind, and aggressive language in the chat will not be tolerated. You will be removed from the session if it happens again.

**Before we get started:**

**If you ever feel that you are in physical or psychological danger, no matter where you are, please remove yourself from that situation as quickly as possible.**



# Learning Objectives

- **Learn** what strategic planning is (and isn't) and how it can help your chapter focus its energy and respond to community needs
- **Explore** simple ways to consider strategic questions that deserve deeper discussion and assess where your chapter is today, including strengths, challenges, and external factors
- **Develop** a shared, practical vision for what you want your chapter to achieve in the next 1–5 years
- **Leave** with tools to turn plans into action, including setting priorities and realistic, measurable goals



# Getting Started

Getting Started

# In the Simplest Terms

Nonprofit strategic planning, allows your chapter to consider strategies that will best enable you to advance your mission.

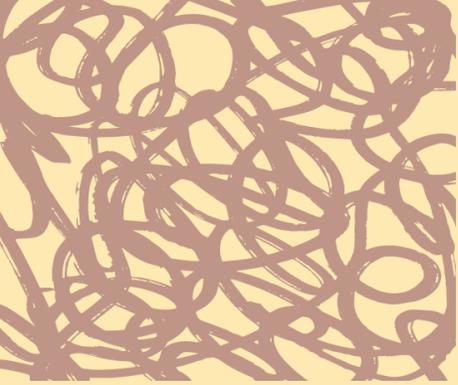


# Key Questions for Strategic Planning

These very basic questions are at the root of strategic plans as they develop:

- **Who are we**, in the context of our community and environment?
- **What do we do best** and feel a pull toward?
- **How will we** thoughtfully and collaboratively move forward for the good of our community and the world?
- **What should we do now**, given the answers to the previous questions?





# Has your PFLAG Chapter board done strategic planning before?

- A. What is strategic planning?
  - B. No, but we've been thinking about it
  - C. We've done it in the past
  - D. Yes, on a regular basis
- 
- 

# The Benefits of Strategic Planning



# Addressing Common Challenges

Strategic planning helps organizations of all sizes address challenges that impact nonprofits and volunteer-led organizations like your PFLAG chapter. This includes:

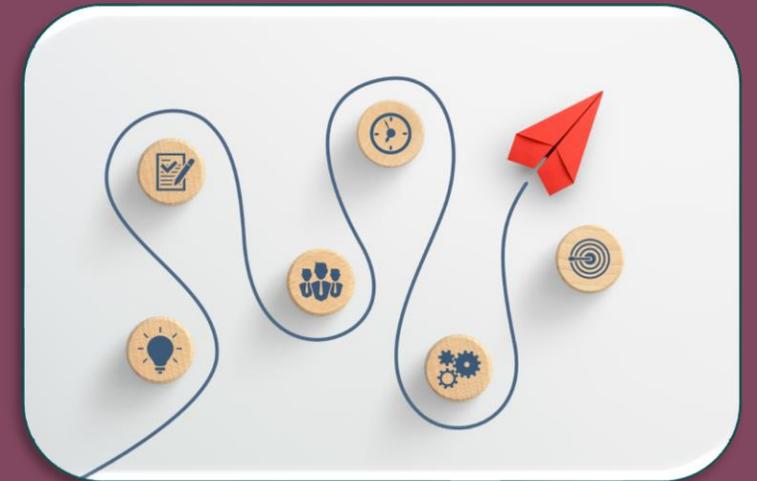
- Having no cohesive idea of the chapter's priorities
- Managing vague ideas about the direction the chapter is headed
- Being unsure about whether the chapter, and chapter leaders, are being responsive to community needs
- Dealing with big, emergent issues and questions that keep coming up and the need to figure them out



# Managing Volunteer Capacity

Having a detailed strategic plan ensures that:

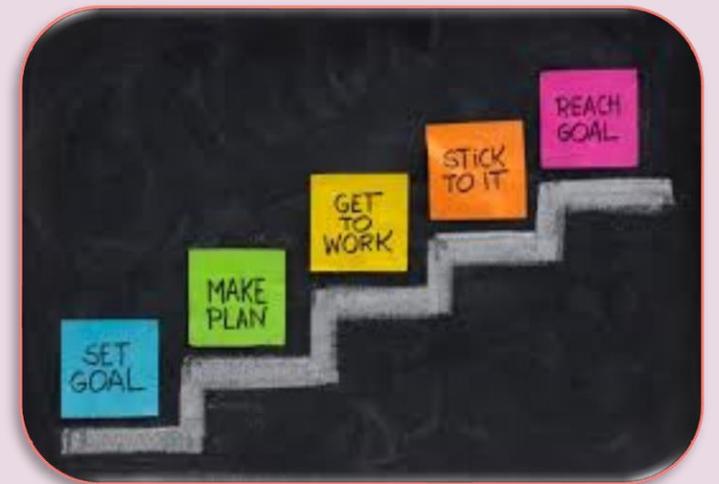
- The work reflected in your strategic plan reflects your board members' and other chapter volunteer's capacity
- Your chapter can scale down or up to keep the workload sustainable
- Chapter leaders can eliminate, add, and/or adjust work that is not mission-aligned or respondent to community needs

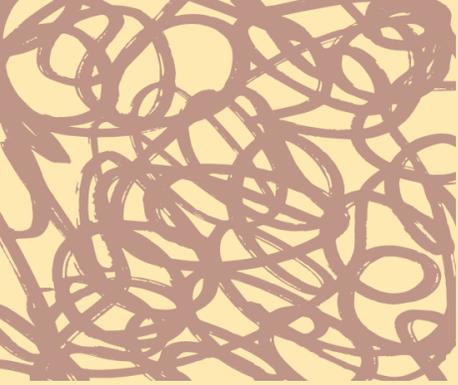


# Understanding Roles and Responsibilities

Having a detailed strategic plan also provides:

- Board members with clarity about their roles and responsibilities, including those related to developing a strategic plan
- Chapter leaders with clarity about priorities and future strategies
- A better position for your chapter to ask for funding, as it will be easier to articulate goals and what funds will be used for
- An opportunity for your chapter to ensure that your goals are aligned with PFLAG National's expectations





**If your board has done strategic planning, what has it looked like?**

**A. Informal discussion**

**B. Structured discussion**

**C. Full board retreat**

**D. Something else (share in chat)**



## Before we move on...

This workshop shows you what an in-depth and more formal strategic planning process could look like. But please remember that there is no “one-size-fits-all solution. It can look many ways. This is because:

- Your chapter board may have limited capacity for changing or growing chapter work
- Your chapter may have a less formal process in place for annual planning
- Your chapter board’s capacity for doing strategic planning varies

**Take what is valuable and within your board’s capacity and leave what isn’t!**





# **Preparing for the Strategic Planning Process**

# Check In With Yourself as a Board

**Before your chapter board begins the strategic planning process, ask yourselves:**

- How much time can we as a board devote to this process? (more time is better but respect your capacity!)
- Would we like to create a strategic plan for one year? Three years? Five years?
- What time of year would we like to do our strategic planning?
- During the strategic planning meetings, how can we take care of ourselves?
- How can we best communicate with each other during this process? What are our community agreements?



# Assess Your Community's Needs

**Your community's needs should inform your chapter's strategic plan because they:**

- Give you the opportunity to learn more about others' perception of your chapter's strengths opportunities, and growth areas
- Deepen your understanding of how your chapter is (currently) delivering the most value
- Help you to build community buy-in for your chapter and the work you are doing



# Assess Your Community's Needs

**Your community's needs should inform your strategic plan because they:**

- Give people the feeling that they had a part in your chapter's planning
- Help to develop a foundation for future relationships with community members and partners, external to PFLAG
- Build and strengthen a culture of reciprocal learning amongst chapter leaders, chapter members, community members, and community partners



# How to Collect Information

Collecting information about your community's needs before you start your strategic planning process can be done by:

- Having formal and informal conversations with board members during a board meeting
- Sending a survey to your board, volunteers, members, and supporters via social media and emails
- Asking attendees to complete the survey at a support meeting



# How to Collect Information

**Collecting information about your community's needs before you start your strategic planning process can be done by:**

- Hosting a facilitated conversation at a support meeting with attendees
- Asking members to provide 1:1 feedback to trusted board members
- Scheduling a call, meeting with, or emailing community partners



# Information to Ask For

**As you assess community needs, consider seeking answers to the following questions from your community:**

- How is our chapter programming doing in terms of support? Education? Advocacy?
- How are our relationships with other organizations and groups in our community?
- What part of our work is adding the most value to our members and the community?
- What work should we lean into and do more of?
- What work do we need to pay more attention to? What would the community like to see from us?





# Starting Your Strategic Plan

# SWOT Analysis

**SWOT Analysis is a tool commonly used to begin the strategic planning process. Key questions that are considered include:**

- What are our chapter's strengths?
- What are our chapter's weaknesses?
- What opportunities are available to our chapter?
- What threats do our chapter need to pay attention to?
- What should chapter leadership prioritize in the next year? 3 years? 5 years?

# SWOT Analysis, Visualized

## What's in a SWOT analysis?

The good

The not-so-good

What we've got

### Strengths

What resources can we deploy?  
What are our advantages?  
What's working well?



### Weaknesses

What abilities are we lacking?  
Where are we starting to struggle?  
How can we overcome these?



What's out there

### Opportunities

Who might most value our strengths?  
What trends work in our favour?  
What prizes are within reach?



### Threats

What headwinds do we face?  
Who might challenge us?  
What could go wrong?



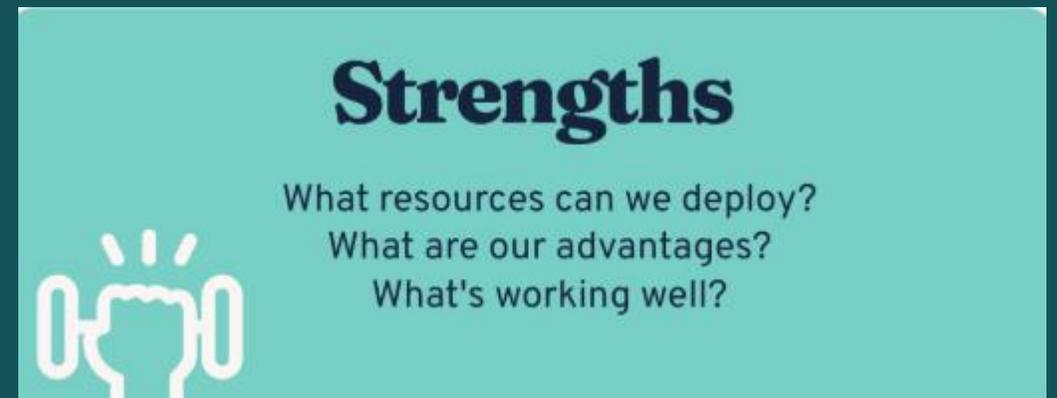


**Your chapter's SWOT analysis should be informed by the research into your community's needs.**

# A SWOT Analysis from PFLAG Juneau

## Strengths

- Dedicated board!
- Community connections/contacts
- Interest when tabling
- Money!
- Scholarship & legacy
- Picnic - large annual community event
- Good reputation



# A SWOT Analysis from PFLAG Juneau

## Weaknesses:

- Aging population within the chapter and community
- Small board, limited capacity
- Social media skill gap
- Follow through
- Communication between board and to community/members
- Spreading the workload

## **Weaknesses**

What abilities are we lacking?  
Where are we starting to struggle?  
How can we overcome these?



# A SWOT Analysis from PFLAG Juneau

## Opportunities:

- Supportive community
- Young families
- Public Radio (PSAs/Programming)
- Flyers
- Other non-LGBTQ+ allied organizations
- Cross-organizational social events
- Advocacy – state capital, federal administration

## Opportunities

Who might most value our strengths?

What trends work in our favour?

What prizes are within reach?



# A SWOT Analysis from PFLAG Juneau

## Threats:

- Weather impacts engagement
- Impact of federal administration on personal safety
- Impact of federal administration on funding
- Perceived negative attitudes
- Lack of state funding for education
- Slashing of DEI programming
- Books bans and censorship





# **Grounding Your Strategic Plan in a Practical Vision**

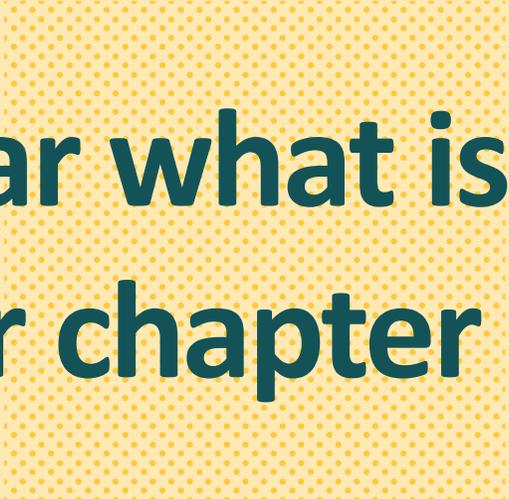
# PFLAG's Mission, Vision, and Values

A common part of the strategic planning process for nonprofits is evaluating and updating the organization's mission, vision, and values. PFLAG chapters' mission is the same as PFLAG National's.

## **Our Mission**

To create a caring, just, and affirming world for LGBTQ+ people and those who love them.

**This allows you to focus on your chapter's  
practical vision instead.**



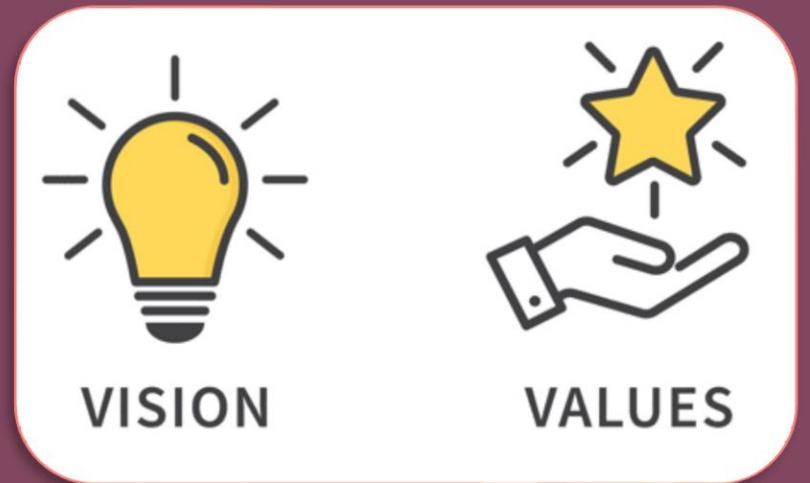
**In the next year what is one thing you  
would like your chapter to accomplish?**



# Creating a Practical Vision

*What do you want to see in place as a result of our chapter's actions, at the end of our strategic plan?*

- Board members should each come up with a few ideas
- Responses should be grounded in the information you collected about community needs and the SWOT Analysis your board completed
- Once responses have been collected, they can be fit into larger categories that drive your goal setting



# Practical Vision: School-Based Advocacy

## Desired outcomes of chapter's actions:

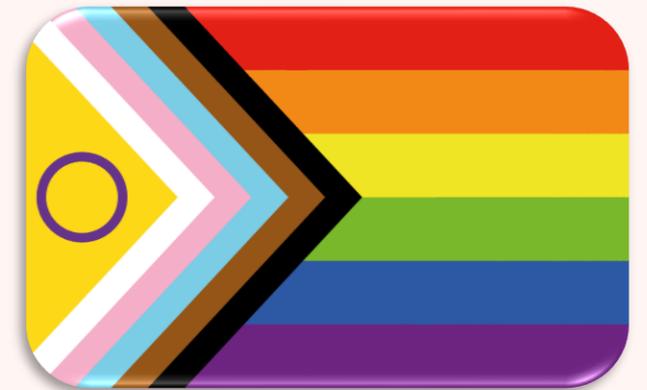
- Regular chapter presence at school board meetings around the county, not just in our chapter's central location
- Relationships with school district admins
- School libraries have copies of LGBTQ+ books available to students that are donated by our chapter



# Practical Vision: Improved DEI Practices

## Desired outcomes of chapter's actions:

- Reciprocal partnerships with local organizations serving BIPOC communities
- PFLAG resources are shared effectively and widely across our whole local community
- Our meeting space and structure is more accessible to people with disabilities



# Practical Vision: Engage Younger Parents

## Desired outcomes of chapter's actions:

- Knowledge of PFLAG within parent-teacher organizations at local K-12 schools
- Board members sourced from local university





# Implementing Your Strategic Plan

# Setting SMART Goals

<b>S</b>	<b>Specific</b>	Make your goal specific and narrow for more effective planning	
<b>M</b>	<b>Measurable</b>	Make sure your goal and progress are measurable	
<b>A</b>	<b>Achievable</b>	Make sure you can reasonably accomplish your goal within a certain time frame	
<b>R</b>	<b>Relevant</b>	Your goal should align with your values and long-term objectives	
<b>T</b>	<b>Time-based</b>	Set a realistic but ambitious end date to clarify task prioritization and increase motivation	

# Examples of SMART Goals

- Help others to understand that being transgender isn't inappropriate for kids by sharing PFLAG parent testimonies that explain how a book removal affects their children at the March 25th school board meeting
- Train one additional facilitator by June 1, 2026 utilizing PFLAG National's facilitation training resources and having them shadow current facilitators.
- Raise \$2,500.00 by March 1, 2027 by applying for the Community Foundation grant and reaching out to past major donors.



# Examples of SMART Goals

- Update chapter bylaws to reflect PFLAG National’s expectations and current chapter operating procedures by October 1, 2026 using PFLAG National’s template and having the membership vote at September’s annual meeting.
- Increase membership by 25% by March 1, 2026 by engaging board members and chapter members as recruiters, outreaching to community partners, and creating membership benefits with swag



BYLAWS: PFLAG XXX

*Comment: These bylaws are a template, which will leave room for later amendments as the local organization grows and matures. Articles I, II, and III cannot be altered. If you decide to adopt these sample bylaws as they are, remove italic comments and send them with your documentation.*

### ARTICLE I NAME

1. The name of this organization shall be PFLAG XXX. PFLAG XXX shall hereinafter be referred to as “chapter.”

### ARTICLE II AUTHORITY

- 2.1. Charter – The Chapter shall operate under a charter granted by the Board of Directors of PFLAG INC, hereinafter referred to as “PFLAG National.”
- 2.2. Bylaws – The Chapter shall operate under the bylaws of PFLAG National, a copy of which is attached. The bylaws of PFLAG National are incorporated herein by reference.

### ARTICLE III PURPOSE AND SCOPE

3.1. Support PFLAG National – The purpose of the Chapter shall be to support the mission of PFLAG National, which is to create a caring, just, and affirming world for LGBTQ+ people and those who love them. The Chapter shall not engage in any activity that jeopardizes the tax-exempt status of PFLAG National under Internal Revenue Code section 501(c)3, including funding, endorsing, or contributing to the election campaign of any candidate for public office.

*Comment: Chapters may not support or oppose political candidates, but members may do so in their private capacity. If you have any questions, please contact PFLAG National staff.*

3.2. Limits – The chapter shall take no legal action without the approval of the Board of Directors of PFLAG National.

3.3. Logo – The PFLAG National logo may be used on chapter publications, advertisements, and in materials to be sold for fundraising purposes, letterhead, publicity, and whatever other uses are

# Developing an Action Plan

**SMART Goal:** Increase membership by 25% by September 30, 2026 by engaging board members and chapter members as recruiters, outreach to community partners, and creating membership benefits with swag.

- **What?** Increase membership
- **Who:** Board members, current chapter members, community partners, local businesses
- **How:** Create member benefits, increase membership focused outreach, run large-scale membership drive using current board members, chapter members, and community partners as recruiters



# Developing an Action Plan

**SMART Goal: Increase membership by 25% by September 30, 2026 by engaging board members and chapter members as recruiters, outreach to community partners, and creating membership benefits with swag.**

- **How much funding is needed?** \$200.00 for swag included in membership benefits
- **How much time is needed?** 5 hours per month, per board member
- **How will results be measured?** Demonstrated 25% increase in membership
- **When will results be measured?** Deadline of September, 2026



# Example of an Action Plan

## October – December 2025:

- Decide what member benefits will be
- Build community partnerships with other membership-based organizations
- Strengthen reciprocal community partnerships with existing partners



# Example of an Action Plan

## January – March 2026:

- Ask local businesses to donate goods or discounts for use as a membership benefits
- Uplift opportunities for community partners to build reciprocity
- Build volunteer outreach base from current members



# Example of an Action Plan

April – June 2026:

- Order discounted swag from PFLAG National to supplement membership benefits
- Uplift membership when tabling at community events
- Use Pride opportunities with community partners to increase membership



# Example of an Action Plan

## July –September 2026:

- Use existing communications channels to run membership drive
- Ask community partners to advertise membership drive
- Uplift member benefits during membership drive
- Utilize board member, chapter member, and volunteer base to advertise membership





# Finalizing Your Strategic Plan

# Your Strategic Plan

Your strategic plan will be a compilation of everything your board decided on during the planning process. This will include your chapter's:

- Data from your community needs assessment
- SWOT analysis
- Practical vision
- SMART Goals
- Action Plans

# A Strategic Plan from a PFLAG Chapter

Priority	Goal	Goal #	Timeline	Lead	Committee (as applicable)	Status
Critical	Recruit New Board Members	1	By 9/30/26	President	Membership /Outreach	Not Started
High	Collaborate & Build relationships with other local LGBTQ+ Organizations	2	By 5/31/26	Outreach Chair	Public Information/ Outreach	Not Started
High	Educating the broader community about LGBTQ+ lives and experiences	3	By 9/30/26	Education Chair	Speakers Bureau	Not Started
Normal	Follow up with all new contacts/outreach and increase membership by at least 4 households	4	By 8/1/2026	Membership Chair	Membership /Outreach	Not Started

# What's next?

Once you have finalized your strategic plan and begun implementing your goals through your action plan, you should also:

- Thank your community for their input
- Ensure that it is clear who is taking on which elements of your chapter's action plans
- Put regular check-ins on your SMART goals and action plans on the calendar
- Prioritize your SMART goals
- Have regular conversations to determine which SMART goals will be shifted into the new year if it becomes clear that some will not be completed or that chapter capacity has changed



**Celebrate!**

**Strategic planning is a lot of work. Be proud of yourselves for setting a clear path forward for your chapter.**





**Wrapping Up**

# Resources to Help You Get Started

## Organizations with Free Strategic Planning Resources



## Resources from PFLAG (in the Member Portal)

### Chapter Board Templates

Share [Twitter](#) [Facebook](#) [LinkedIn](#) [Email](#)

- [Sample Board Positions](#) (PDF)
- [Sample Board Committees](#) (PDF)
- [Sample Treasurer's Report](#) (Word Doc)
- [Community Mapping Worksheet](#) (Word Doc)
- [Chapter Board Meeting Agenda Template](#) (Word Doc)
- [Community Partner Letter Template](#) (Word Doc)
- [Interest Meeting Outline – New Chapters](#) (Word Doc)
- [Chapter Community Survey](#) (Word Doc)

Updated: 2024

## PFLAG

### Taking a Step Back: Prioritizing Self Care as a PFLAG Chapter Leader

*"Caring for myself is not self-indulgence, it is self-preservation and that is an act of political warfare." - Audre Lorde*

#### Section Guide

[Introduction](#)  
[Methods of Self Care](#)

- [Log off.](#)
- [Reconnect with why you do this work.](#)
- [Help another person out.](#)
- [Help out in the wider community.](#)
- [Have some real-world fun.](#)
- [Slow down your PFLAG work.](#)
- [Know when to seek outside support.](#)



[pflag.org/resource/strategic-planning](https://pflag.org/resource/strategic-planning)



**Do you have any questions?**





PFLAG.ORG

# THANK YOU

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