



Strategic Planning Resources

General Background Resources: Applicable to all stations

Resource	Location
<ul style="list-style-type: none"> • Key websites <ul style="list-style-type: none"> ○ Major Giving Initiative (MGI) ○ Board Source ○ Affinity Group Coalition Planning Project (AGC) ○ Corporate Support Performance Initiative (CSPI) • “<i>Planning Tools and Provocations</i>” AGC Planning Project report • <u>Good to Great and the Social Sector</u>, Jim Collins 	<p>http://www.majorgivingnow.org/</p> <p>http://www.boardsource.org/</p> <p>http://www.ptv-agc.org</p> <p>https://secure.connect.pbs.org/pbsdocuments/pbs/development/CorporateSupport/cspi/cspi_index.htm</p> <p>http://www.ptv-agc.org</p> <p>http://www.jimcollins.com</p>

Specific Planning Tools and Studies: Pick and Choose Most Useful Tools

Tools	Intended Use	Where to find it
5+ Year Planning Horizon		
Scenario Planning exercise.	<ul style="list-style-type: none"> ○ Provoke discussions about the impact of four very different potential future media environments on station’s business. ○ Push stations to consider how they would respond to several very challenging (and possibly scary!) business environments. 	http://www.ptv-agc.org/archive.htm
Imagining Exercise	<ul style="list-style-type: none"> ○ Promote thinking about the future of the station from three vantage points: the living room of a local family; the Board room of a major foundation in your community; and from inside the station. ○ Allow teams to articulate the future in a free-flowing narrative format that can be understood by all – including “non-pro’s” on the Board, and community. ○ Serve as a preliminary exercise for developing and articulating a Vision statement. 	<p>“<i>AGC Planning Tools and Provocations</i>”, p. 11</p> <p>http://www.ptv-agc.org/imagine_2012.htm</p>
1-5 Year Planning Horizon		
Retreat Exercise	<ul style="list-style-type: none"> ○ Test station’s current strategic plan against potentially different future media environments. 	http://www.ptv-agc.org/archive.htm



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Specific Planning Tools and Studies, continued: Pick and Choose Most Useful Tools		
Tools	Intended Use	Where to find it
<i>1-5 Year Planning Horizon, continued</i>		
How People Use Media	<ul style="list-style-type: none"> Promote discussion on station’s future Content and Delivery Strategies in recognition of changing consumer behavior and increased competition for viewer’s screen time. 	<p>“AGC Planning Tools and Provocations”, p. 5 http://www.ptv-agc.org/CPBTechBrief-July06.ppt</p>
CPB Primetime Research	<ul style="list-style-type: none"> Provide understanding of public responses to the NPS. 	<p>http://www.cpb.org/stations/npsresearch/</p>
Audience Segmentation	<ul style="list-style-type: none"> Provoke analysis and understanding of the changing profile of audiences, and strategies to reach them. 	<p>“AGC Planning Tools and Provocations”, p. 8-9 http://www.ptv-agc.org/End%20of%20TV%20as%20we%20know%20it.pdf</p>
Developing Mission, Vision and Values	<ul style="list-style-type: none"> Identify and articulate station’s Case Strategy. 	<p>http://majorgiving.cpb.org/resources/case_building.html</p>
Create, Add Value, Distribute	<ul style="list-style-type: none"> Provide a simple way to evaluate how stations use and acquire resources; understand station’s position vis-à-vis competitors and potential partners; and map station strategies. 	<p>“AGC Planning Tools and Provocations”, p.15 http://www.ptv-agc.org/PostRRArchive-for-Web/ScenarioExerciseWorksheet.pdf</p>
Content strategies for local content	<ul style="list-style-type: none"> Promote the sharing of ideas and spark new ones by showcasing the strategies of diverse stations and identifying the common themes that unite them. 	<p>“AGC Planning Tools and Provocations”, pp. 16, 18 http://www.ptv-agc.org/LocalServices.htm</p>
Local Outreach	<ul style="list-style-type: none"> Share outreach ideas and resources. 	<p>http://www.nationaloutreach.org/</p>
Your Station’s “economic engine”	<ul style="list-style-type: none"> Provide a simple model for understanding station’s sources of revenue. Provide perspective on the different economic models of PTV stations. Help stations think about how to modify the “economic engine” that drives stations. 	<p>“AGC Planning Tools and Provocations”, p. 19-21 http://www.jimcollins.com</p>
Fee for service/ subscription models	<ul style="list-style-type: none"> Stimulate stations’ thinking about creating revenue generating distribution strategies. 	<p>“AGC Planning Tools and Provocations”, p. 22 http://www.ptv-agc.org/DTFFinalWhitePaper.pdf (p.8)</p>
Identifying Skills Needed in the Future	<ul style="list-style-type: none"> Help describe how stations can think about matching skill sets with future business strategies. 	<p>“AGC Planning Tools and Provocations”, p.23</p>
Identifying Organizational Structures to match changing strategies	<ul style="list-style-type: none"> Provoke thought on how best to organize stations as we change from being public television – to public media companies. 	<p>“AGC Planning Tools and Provocations”, p. 24</p>



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Specific Planning Tools and Studies, continued: Pick and Choose Most Useful Tools		
<i>1-5 Year Planning Horizon, continued</i>		
Tools	Intended Use	Where to find it
Articulating your Brand Strategy	<ul style="list-style-type: none"> ○ Understand PBS’ Brand strategy. ○ Provoke discussion and the articulation of what makes each station distinctive; relevant and consistent in demonstrating who they are and how they interact with others. 	www.pbs.org (Be more) <i>“AGC Planning Tools and Provocations”</i> , p. 26 http://www.beyondmarketingthought.com
Approaching the strategic planning process	<ul style="list-style-type: none"> ○ For stations which aren’t strategic planning regulars, some important steps in the planning process. 	<i>“AGC Planning Tools and Provocations”</i> , pp. 30-31
Articulating your strategic plan.	<ul style="list-style-type: none"> ○ A sample table of contents intended to show the basic components of a strategic plan 	<i>“AGC Planning Tools and Provocations”</i> , p. 32

Station Documents to Review: Many of the following documents (*the bullet points*) exist at stations and are helpful to review when developing a strategic plan. The documents are listed under the component of the strategic plan (*headings in bold and italics*) for which they are most relevant.

Case Strategy

- Current mission, vision, values statements – if available
- Recent grant applications
- MGI reports - if available
- CSPI reports and evaluations - if available
- Station By-laws and other relevant governing documents

Content and Service Strategy

- Program guide
- Station website
- Existing station strategic and/or work plans
- Community Input on station
- Recent Annual Reports
- Recent grant applications



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Strategic Planning Resources

Station Documents to Review, continued

Financial Strategy

- SABS and SAS
- Station Financial statements, including Annual Financial Report
- MGI reports - if available
- CSPI reports and evaluations - if available

Organizational Strategy

- Board Source: Integrated Report and Action Plans (for stations that have worked with Board Source)
- Station By-laws and other relevant governing documents
- Names and positions of staff members and organization chart
- Names and positions of Board members
- New Employee Handbook
- New Board Member Handbook
- Succession Plans
- Employee Training Plans

Brand Strategy

- Program guide
- Station website
- Recent grant applications
- MGI reports if available
- CSPI reports and evaluations if available
- Donor or Membership Solicitation Letters
- Print and On-air Station Promotions

Environmental Trends (Competition and demographic trends in coverage area)

- Competitive Data – Information on other local media outlets
- Pertinent regional and local information re: growth; demographics; business; and cultural shifts



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Station Documents to Review, continued

Current Strategies and Audience

- Current mission, vision, values statements – if available
- Existing station strategic and/or work plans
- Key station measurements (May vary, but these have been helpful to many stations.)
 - Membership numbers, \$
 - Revenue and Expense trends
 - Viewer #'s, Cum's
- Community Input on station
- Station website
- SABS and SAS
- Program guide
- Grade B coverage map