Strategy and Fiscal Health (Business) Institute Outline

Description and Rationale:

Politically speaking, labor unions are now under attack more than ever. The conversation changed from, “If the Supreme Court rules against us,” to, “When the Supreme Court rules against us.” We have known for a while that it is only a matter of time before the inevitable happens. What is your association doing to prepare for the “inevitable”? Is your Local, Council, and State budget prepared for the membership and revenue loss that an unfavorable decision by the United States Supreme Court will cause?

Elected leaders have a fiduciary responsibility to prepare their budgets for anticipated revenue loss in both Agency Fee and Right-To-Work states. Participants in the Strategy and Fiscal Health Institute will learn how “stress test” their budget and create a plan for insuring the financial future and long-term sustainability of their Local, Council, or State affiliate.

Learning Outcomes:

At the end of the Strategy and Fiscal Health Institute, participants will be able to estimate future revenue losses for their association, become aware of their association’s ability to withstand this financial impact, and possess tools and knowledge to guide their association through the impending revenue loss. Participants will also learn strategy and fiscal health best practices to share with their association’s governing body.

Prepare:

Participants will be required to bring their current budget and governing documents to the Institute.

NEA Leadership Institute Breakout Sessions and Leadership Competencies:

The Supreme Court Budget Smack: Review how the Janus case will change the fiscal future of locals/Councils/States in agency fee and right to work states.

1. Quick review of pre-Janus world.
2. Present likely immediate impact of Janus on your revenue.
3. Anticipate long-term impact of Janus.
4. Outline additional attacks against unions beyond Janus.
5. Show how member loss in agency fee states also impacts right to work states.
6. Present data from states that recently lost agency fee/fair share.
7. Review your fiduciary responsibilities

Competencies

- Promotes stewardship and financial integrity of the organization Level 1
- Utilizes data and analyzes trends to inform decision making Level 1 and 3
How Vulnerable Is Your Budget To Member Loss?: Stress test the membership numbers, budget, and governing documents for the state/council/local member group you are most directly responsible for managing.

1. Use polling data to anticipate membership loss post-Janus.
2. Honestly assess unfunded liabilities, reserve funds, and deficit spending.
3. Assess checks & balances and transparency of your budget and spending process.
4. Identify needed changes in your budget and spending practices.
5. What needs to be changed in your governing documents.

Competencies

- Acts strategically to align the association’s work with member needs - Level 2
- Understands the interdependency of strategic planning, budget development, and business policy - Level 3
- Promotes stewardship and financial integrity of the organization - Level 3
- Supports financial health - Level 2
- Utilizes data and analyzes trends to inform decision making - Level 1 and 3

Taking Progressive Fiscal Steps Back Home: Create the plan for the necessary steps that need to be taken back home to secure the fiscal future of your state/council/local association.

1. Present best examples of how governing bodies are utilized in the budget process.
2. Present best examples of using member polling to help prioritize association budgets.
3. Assess level of fiscal training and knowledge amongst your association officers.
4. What steps do you need to take back home regarding budget training, budget/spending practices, and governing documents.
5. What do you need in future contacts from NEA regarding your associations fiscal health?

Competencies

- Acts strategically to align the association’s work with member needs - Level 3
- Understands the interdependency of strategic planning, budget development, and business policy - Level 2
- Promotes stewardship and financial integrity of the organization - Level 2 and 3
- Supports financial health - Level 3
- Utilizes data and analyzes trends to inform decision making - Level 2 and 3

Post Summit

Post Summit – Touch #1

Establish an Ed Communities page in March 2018. Participants will create NEA360 logins and added to the “Strategy and Fiscal Health Leadership Institute” Community during the March 2018
convening in Chicago. Questions, comments, and articles will be posted throughout the year, which participants will need to provide feedback and commentary on the Ed Communities page.

Post Summit – Touch #2

May/June 2018 - Questions will be circulated to the participants to assess the successes and the challenges they have faced with their three-month goals as established at the March 2018 convening regarding their strategic plans and strategic budget development and governing document review.

Post Summit - Touch #3

June 2018 – A summary of the responses will be compiled from the May/June 2018 questions and will be presented in a webinar for participants. This will provide the opportunity for participants to see the successes and challenges their cohorts experienced as well as offer an opportunity to find solutions and get feedback for their particular situation.

Post Summit – Touch #4

September 2018 - Questions will be circulated to the participants to assess the successes and the challenges they have faced with their six-month goals as established at the March 2018 convening regarding their strategic plans and strategic budget development and governing document review.

Post Summit - Touch #5

October 2018 – A summary of the responses will be compiled from the September 2018 questions and will be presented in a webinar for participants. This will provide the opportunity for participants to see the successes and challenges their cohorts experienced as well as offer an opportunity to find solutions and get feedback for their particular situation.

Evaluation:

Initially there will be a pre and post questionnaire assessment at the Leadership Institute in Chicago. That will determine how effective the Institute was during March session and will be used to augment touchpoints during the year. Assessments will also accompany each “check-in” during the year.