UNITING OUR MEMBERS AND THE NATION

Empowering leaders, educating students, strengthening communities

We’ve Planned Strategically; Now We Need to Fund the Plan

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South Dakota Education Association
COMPETENCY: Strategy & Fiscal Health

• NEA Leadership Competency Progression Level:
  – Level 1 Foundational - Utilizes the association’s strategic plan to create a strategic budget that is inclusive of funding to support member diversity and social and racial justice programs

• NEA Leadership Competency Theme:
  – Understands the interdependency of strategic planning, budget development, and business policy
NEA Strategic Goal and NEA Organizational Priority

• NEA Strategic Goal
  – Strategic Goal 1: Strong Affiliates for Educator Voice and Empowerment

• NEA Organizational Priority
  – Early Career Educators
Who am I?

- Paul McCorkle, CFO/CIO of South Dakota Education Association
- Experience with Strategic Budgeting
- Why do we Budget Strategically?
- How do we Budget Strategically?
The Mission

Why do you exist?
What is S.W.O.T.?

• Strengths
• Weaknesses
• Opportunities
• Threats
What is S.W.O.T.?

- Who does the SWOT analysis?
- What is the outcome of the SWOT analysis?
Goals Are Set

• Goal Area 1
  – Advocate for Public Education
    • SDEA will engage and collaborate with Association stakeholders and potential partners to advocate for public education, influence policy development, secure adequate funding, enhance professional practice, and promote racial and social justice
Goals Are Set cont.

- Goal Area 2
  - Build Organizational Capacity
    - SDEA will advance a culture of organizing designed to build organizational capacity throughout the organization
Goals Are Set cont.

• Goal Area 3
  – Enhance the Association’s Image
    • SDEA will enhance its image in the community and among stakeholders

• Goal Area 4
  • SDEA will secure the environment necessary to protect and advance the rights and voice of our members
Programmatic Support

• Governance
  – Facilitate and support well-informed decision making by the governance of the SDEA

• Operations
  – Administer the SDEA's business operations in a manner that supports the changing needs and priorities of the organization
Tactics, Activities and Metrics

• Tactics
  – A general overall statement that identifies a specific, or immediate action

• Activities
  – A specific action that carries out or implements the tactic
Tactics, Activities and Metrics cont.

• Metrics
  – Outcome of the activity or a measurement of the activity success
Examples of Tactics, Activities and Metrics

• **Tactic:**
  – Develop the organizational capacity of SDEA affiliates

• **Activity:**
  – SDEA will promote the image of its ESP members
Examples of Tactics, Activities and Metrics cont.

• **Metric:**
  – Each issue of the Advocate will feature at least one significant story focused on ESP members and their work
Tactics and Activities

• Tactics are developed by leadership with input of staff (if you have staff)

• Activities are developed by staff or leadership

• Do your goals support activities for diversity and racial justice programs?
Funding the Strategic Plan

• Revenue
  – How much revenue is needed?
  – What are the sources of revenue?
  – F.B.E.
Determining Membership for Budgeting Purposes

• Need an accurate way to measure and predict membership for income purposes
  – Membership Counts
  – F.B.E. = Full Budget Equivalent
  – S.W.A.G. = Scientific Wild XXX Guess

• Local can partner with state to develop a responsible budget
Budgeting for Expenses

- Operational costs
- Governance costs
- Salaries and Fringe Benefits
- Savings
Other Budgeting Considerations

- Contingency Funds
- Savings
- Accounting system
- Fiduciary Responsibility (Stewardship)
The Mechanics of a Strategic Budget

• Develop a detailed budget
• Estimate the time each goal area will take to implement
• Who will implement each goal area?
The Mechanics of a Strategic Budget

• Relating Costs
  – RPE

• Goal area costs will point to a specific line item(s) in the detail budget

• Does the budget balance?
• Is the budget realistic?
Budget Approval

- Seek approval by the appropriate governing body
- Transparency & Due Diligence
Strategic Budget Example

Goal Area 4

Advance the Well-Being of Members

SDEA will secure the environment necessary to protect and advance the rights and voice of our members.

Tactic-1

Provide bargaining training, resources and support to local affiliates to achieve successful outcomes through negotiations.

Activity - A

The SDEA will provide negotiations training to local associations. Metric – Each UD will provide various types of bargaining training including student centered, organizing for power, IBB, traditional etc. to local associations as determined by the needs desires of the individual local.

Activity - B

The SDEA will collect information regarding negotiation settlements for research purposes to assist in future negotiations. Metric – The SDEA will develop an online form to collect compensation and benefit information from negotiation settlements. Metric – The SDEA will put an accessible collection of negotiated agreements online on the members-only section of the SDEA.
Session Outcomes

The content from this session can be used in the following ways in your current position/role:

- Example 1 = Provides a means to connect with the membership
- Example 2 = Provides the “Why” we exist
- Example 3 = Provides member engagement
- Example 4 = Provides a “value added” atmosphere to the organization
- Fiduciary Responsibility
Thank you for attending

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Closing

• Please complete the evaluation for this breakout session by using the NEA Summit Mobile APP!

• Please visit the Leadership Development Resources website at www.nea.org/leadershipdevelopment