UNITING OUR MEMBERS AND THE NATION

Empowering leaders, educating students, strengthening communities

Supporting Strategic Decision Making: How to Conduct a SWOT Analysis

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COMPETENCY: Strategy & Fiscal Health

• NEA Leadership Competency progression level:
  – Level 2: Mobilizing & Power Building

• NEA Leadership Competency themes:
  – Acts strategically to align the association’s work with member needs
NEA Strategic Goal and NEA Organizational Priority

• NEA Strategic Goals:
  – Strategic Goal 1: Strong Affiliates for Educator Voice and Empowerment
  – Strategic Goal 2: Empowered Educators for Successful Students

• NEA Organizational Priorities:
  – Early Career Educators
  – My School, My Voice
  – Racial Justice in Education
THIS PRESENTATION SUPPORTS:

• Advancement of NEA’s Strategic Goals & Priorities
• Affiliate Leaders in Advancing Goals & Priorities
SESSION OVERVIEW

• What, Whys & When of SWOT
• Where SWOT fits in a Strategic Management System
• Activity 1: Scan Environment & Identify Major Opportunities/Threats
• Activity 2: Clarify Strengths Weaknesses
• What to Do About Your Findings: NEA View
• Activity: Your View & Next Steps
• Discussion & Close
WHAT IS A SWOT ANALYSIS?
ELEMENTS OF A STRATEGIC SYSTEM
THEORY OF SUCCESS

Empowered Educators Shape Learning for All Students

Public Support for Education

Success of ALL students

Focus on Locals & Members

Collaboratively Developed School Plans Centered on Student Learning

Policies at District/State Level Defining Professional Practice

Practices and Strategies for Students
SWOT ANALYSIS

STRATEGIC ANALYSIS

INTERNAL
- STRENGTHS: build; enhance
- WEAKNESSES: resolve; reduce

EXTERNAL
- OPPORTUNITIES: exploit; expand
- THREATS: avoid; thwart
DEVELOP GOALS & PLAN

SWOT: What is our situation?

- External
  - Opportunities
  - Threats

- Internal
  - Strengths
  - Weaknesses

STRATEGY: What will we do about it?

- Goals
- Operations
REVIEW & LEARNING

Did We Do What We Said We Were Going To Do?

What Did We Do Well? Not So Well?

What Impact Did We Make?

What Will We Do Differently To Accomplish Our Goals?

What Did We Learn?
SWOT: HOW TO CONDUCT?

INTERVIEWS

LITERATURE REVIEW

REVIEW SURVEYS & SECONDARY DATA SOURCES

GROUP ENGAGEMENTS
STEP 1: EXAMINE EXTERNAL FACTORS
ACTIVITY: SCAN YOUR ENVIRONMENT

• Political
• Economic
• Social/demographic
• Technological
• Education
• Legal
STEP 2: ID OPPORTUNITIES & THREATS
NEA SWOT: THREATS

- Hate
  - Racism
  - Discrimination
  - Bullying
  - Homophobia
  - Disability

- Education
- Funding
- Teachers
- Hate
- Bullying
NEA SWOT: OPPORTUNITIES

GOAL
EDUCATION FOR ALL

EDUCATOR VOICE
Activity: ASSESS INTERNAL CAPABILITIES

- Finances
- Human Capacity
- Membership
- Programs
- Reputation/Membership
- Technology
Step 3: ID Major Findings
NEA’s SWOT: MAJOR FINDINGS

- The urgent need for **educator voice** in decision-making about public schools.
- The political shift to **local-level decision-making**.
- The need to **join with parents and community** to achieve our Mission.
- The imperative for unions to demonstrate a **modernized value proposition**.
STEP 4: SET GOALS
What do these SWOT findings tell us about where we should go in the next two years?
<table>
<thead>
<tr>
<th>If we do nothing, we’ll see...</th>
<th>Our best opportunity is to...</th>
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<tbody>
<tr>
<td>If we do nothing, we’ll see...</td>
<td>Shift to Local Decision-Making</td>
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<tr>
<td>... education privateers having won the hearts of minds of parents and communities, threatening the existence of public education through expansion of vouchers, for-profit charter schools, and homeschooling</td>
<td>... capitalize on our greatest strength – having members in every community in America – by identifying, developing, and supporting educators to lead on a variety of issues at every level of the system</td>
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<tr>
<td>If we do nothing, we’ll see...</td>
<td>Our best opportunity is to...</td>
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<tr>
<td>... worsening of student outcomes and students’ readiness to solve future challenges</td>
<td><strong>Inadequate Educator Voice, Influence, and Autonomy</strong></td>
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<td>... continuation of ineffective and damaging school-based discipline and curricular policies</td>
<td>... secure the avenues through which educator voice is included in decision-making in schools, districts, and states</td>
</tr>
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<td>... education technology replacing professional autonomy and creativity</td>
<td>... Create distributed leadership structures in local affiliates, with many ways for educators to use the Association as a vehicle for their passions and professional growth</td>
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<td>If we do nothing, we’ll see...</td>
<td>Lack of Educator-Parent - Community Partnerships</td>
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<td>... continued decline in funding for public education</td>
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<td>... expanded community acceptance of school privatization disguised as “parent choice”</td>
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<td>... continued inequities and injustice in students’ lives</td>
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SWOT FINDINGS: WHAT TO DO?

- Increase Educator Voice & Agency
- Engage New Educators
- Advance Racial Justice in Education
- Provide Professional Supports
SWOT: How Might YOU Use It?

Think  Pair  Share
Session Outcomes

• Participants will:
  – Understand how SWOT analysis fits into an overall system for developing and honing goals.
  – be able to use SWOT analysis as a process to analyze their environment, assess their capabilities, and make decisions about their goals.
Your Feedback, Please!

• 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](http://www.nea.org/leadershipdevelopment)