Amplifying Our Voice: Leading Boldly for Our Students, Our Professions, and Our Union

NEA Now: Our Strategy and Budget Development

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COMPETENCY: Strategy and Fiscal Health

- Level 1: Foundational; Level 2: Mobilizing & Power Building; and Level 3: Agenda Driving

  - Acts strategically to align the Association’s work with member needs
  - Understands the interdependency of strategic planning, budget development, and business policy
  - Promotes stewardship and financial integrity of the organization
  - Supports financial health
  - Utilizes data and analyzes trends to inform decision making
• NEA Strategic Goal
  • Build the capacity of the local, state and national union to ensure the success of public education.

• NEA Organizational Priorities
  • Early Career Educator
  • Racial Justice in Education
  • My School, My Voice
  • Supporting Professional Excellence
Overview

• The Foundation and the Process
• Keys to Organizational Success
  o Strategy
  o Processes
  o Culture
• Gather & Utilize Data
• The Framework
• Assess Progress
NEA Hierarchy of Choices

Relevant Questions
who, what, when,
where, why, how?

Which?
How?
What?
Why?
Who?

Area of Focus

Activities
Tactics
Strategy
Vision
Mission

Core Values: Identity
The National Education Association
Vision, Mission and Values
Adopted at the 2006 NEA Representative Assembly

Lily Eskelsen Garcia
President
Rebecca S. Pringle
Vice President
Princess R. Moss
Secretary-Treasurer
John C. Stocks
Executive Director

THE NATIONAL EDUCATION ASSOCIATION
We, the members of the National Education Association of the United States, are the voice of education professionals. Our work is fundamental to the nation, and we accept the profound trust placed in us.

OUR VISION
Our vision is a great public school for every student.

OUR MISSION
Our mission is to advocate for education professionals and to unite our members and the nation to fulfill the promise of public education to prepare every student to succeed in a diverse and interdependent world.

OUR CORE VALUES
These principles guide our work and define our mission:

Equal Opportunity. We believe public education is the gateway to opportunity. All students have the human and civil right to a quality public education that develops their potential, independence, and character.

A Just Society. We believe public education is vital to building respect for the worth, dignity, and equality of every individual in our diverse society.

Democracy. We believe public education is the cornerstone of our republic. Public education provides individuals with the skills to be involved, informed, and engaged in our representative democracy.

Professionalism. We believe that the expertise and judgment of education professionals are critical to student success. We maintain the highest professional standards, and we expect the status, compensation, and respect due all professionals.

Partnership. We believe partnerships with parents, families, communities, and other stakeholders are essential to quality public education and student success.

Collective Action. We believe individuals are strengthened when they work together for the common good. As education professionals, we improve both our professional status and the quality of public education when we unite and advocate collectively.
OUR CORE VALUES:
Who are we?

Equal Opportunity
A Just Society
Democracy
Professionalism
Partnership
Collective Action
OUR MISSION: Why do we exist?

TO ADVOCATE FOR EDUCATION PROFESSIONALS AND TO UNITE THE NATION AND OUR MEMBERS TO FULFILL THE PROMISE OF PUBLIC EDUCATION TO PREPARE EVERY STUDENT TO SUCCEED IN A DIVERSE AND INTERDEPENDENT WORLD.
OUR VISION: What do we want to Achieve?

A Great Public School for Every Student
3 Keys to Organizational Success

• GOOD STRATEGY
• GOOD PROCESSES
• GOOD CULTURE
Planning Language

- **Mission**: Defines why we exist
- **Vision**: Identifies what we want to achieve
- **Strategic Plan**: Document for managing tactical strategy
- **Strategic Goal**: What we intend to accomplish (Short-Term, 2 years)
- **Tactics**: A method for accomplishing an Goal/Core Function
- **Activities**: Which things we will do to achieve our Tactics
- **Measures**: By how much (Quantifies Goals, Tactics, and Activities)
GOOD STRATEGY

• Choices that advance the organization’s vision
• Based on a clear grasp of current reality AND take into account what is needed for the future
  ○ ALWAYS grounded in core values
From Tactical to Strategic

... with continuous feedback
GOOD PROCESSES:
Clear Roles & Responsibilities

Leadership – through officers and board – is responsible for:

- The **What**
- Direction Setting—Setting Outcomes/Ends
- Operational Oversight—not supervise
- Policy Setting—internal operational policy and setting positions on external issues of interest to membership
- Strategic Thinking—the pursuit of the *right questions*

**KNOWLEDGE BASED GOVERNANCE**
Strategic Functions of Leadership

- To approve outcomes to be accomplished
- To ensure the resources necessary for achievement are available and used effectively
- To make sure the desired outcomes are being achieved
GOOD PROCESSES:
Clear Roles & Responsibilities

The staff – led by management – is responsible for:

• The **How**

• Strategic Operations

• Execution: Achieving Outcomes

• Operational Management

  o Organizational Enterprise Operations
GOOD PROCESSES:
Integrated Staff Engagement

- Inform
  - Goal/Core Area
  - Brainstorming Sessions
  - Tactic Lead Meetings
  - Staff Meetings
  - Brown Bags
  - Cabinet & Leads Meetings
  - JLMC Collaboration
  - Online Crowdsourcing Site

- Interpret

- Engage

- Listen
GOOD CULTURE: Trust

- Relevant 2-Way Communication
- History of Promises Kept
- Mutual Understanding & Agreement
Timeline: Strategy and Budget Development

- **July**: NEA RA approved 2018 – 2020 Strategic Plan and Budget
- **2019 – 2020**: is a modification year
- **Sept**: NEA Budget Committee election and orientation
- **Nov/Dec**: Ongoing Strategic and Operational Review (staff) and Budget Engagements
- **Dec**: Board update, and Budget Committee meeting
- **Jan**: Membership projections
Timeline:
Strategy and Budget Development

- **Feb**: Updates and continued engagements – Executive Committee, Board, Budget Committee meeting
- **March**: Updates and continued engagements – Higher Ed, ESP
- **March**: Budget Committee recommendation
- **May**: Board discussion and action
- **June/July**: Virtual Open Hearing, Budget Committee and Board meetings; RA adoption of 2019 – 2020 Strategic Plan and Budget modifications
NEA Strategy Development & Review Process

**Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis**

**Mission, Vision, Core Values**

**Strategic Framework**

**Organizational Strategy & Work-plan Reviews**

2019-2020 MODIFIED STRATEGIC PLAN AND BUDGET FRAMEWORK

- Provide Professional Supports
- Advance Racial Justice in Education
- Recruit and Engage New and Early Career Educators
- Increase Leadership Diversity, Retention Authority
- Enterprise Operations

Expanded Organizational Capacity
Achieving Our Mission & Vision:

- What **Strengths** might we leverage?
- What **Weaknesses** might hinder us?
- What **Opportunities** might we seize?
- What **Threats** are most significant?
SWOT as Basis for Goals & Plan

**SWOT:** What is our situation?
- **External** Opportunities
- **Threats**
- **Internal** Strengths
- **Weaknesses**

**Strategy:** What we will do about it
- Strategic Objectives
- Enterprise Operations
So ... What’s the Strategy?

• Given current trends,

• What threats must we mitigate...

• What opportunities must we seize...

● TO ADVANCE OUR VISION?
Our Frame for Decision-making
Strategic Framework

- Provide Professional Supports
- Secure the Environment to Advance the Mission of the NEA and its Affiliates
- Advance Racial Justice in Education
- Recruit and Engage New and Early Career Educators
- Increase Educator Voice, Influence and Professional Authority
- Expand Organizational Capacity
NEA Strategy Development & Review Process

**Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis**

**Strategic Framework**

**Mission, Vision, Core Values**

**Organizational Strategy & Work-plan Reviews**
### Why Measure?

- We have a **fiduciary responsibility** (and it’s good management)

- To see if we are actually **advancing** our goals

- To monitor if we are truly **making a difference** in the lives of our members, their students, and in public education

- To **learn** from our successes and missteps
Areas to Measure

• Advancing our Strategic Objectives
• Building Organizational Capacity/Improving our Processes
• Progress towards Mission/Vision
Processes for Learning & Course Correction

- By looking at the organization through various lenses — a holistic view
- By examining trends & opportunities, and identifying our strengths & challenges
- By using these findings to suggest course corrections and adjust our plans
NEA Hierarchy of Choices

Relevant Questions
who, what, when, where, why, how?

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Core Values: Identity
Session Outcomes

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

• Integrate strategic planning and budgeting processes
• Incorporate measurement and evaluation into planning and budgeting
• Connect plan and budget to mission, vision, and core values
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NEA Now: Our Strategy and Budget Development

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Evaluation and Resources

• Please complete the evaluation for this breakout session by using the NEA Summit Mobile App! (Allow at least 5 minutes at the end of the session.)

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