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

An Association’s Strategic Plan Begins With Its Mission

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COMPETENCY: STRATEGY AND FISCAL HEALTH

• NEA Leadership Competency progression level:
  • Level 1: Foundational

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

• NEA Strategic Goal
  • Building the capacity of the local, state and national union to ensure the success of public education

• NEA Organizational Priorities
  • Supporting Professional Excellence
Board Member’s Responsibilities

As a board member it is your responsibility to:

• **Safeguard** the assets of the association

• **Protect** the image, reputation and credibility of the association
Board Member’s Responsibilities (cont.)

As a board member it is your responsibility to:

- **Ensure** the resources of the association are utilized to the maximum benefit of the members

- **Preserve** the tax exempt status of the association
“When people are financially invested, they want a return. When people are emotionally invested, they want to contribute.” Simon Sinek
You Can’t Be All things to All People

• Limited financial resources
• Limited human capacity
Gold Prospecting
“All the great organizations in the world, all have a sense of why that organization does what it does.”
Simon Sinek
Mission Driven Organizations

While a corporation’s success is measured by its bottom line and stock value, a nonprofit organization’s success is measured by its ability to achieve its mission. A nonprofit’s mission statement establishes its purpose with both passion and conviction. It should be the foundation upon which all plans and decisions are made.

Source: NESC Roundtable March 10, 2016
Mission Statement

- Why the organization exists
- Whom does it serve
- How is it serving them
- It is grounded in the community issue it is seeking to address

Source: NESC Roundtable March 10, 2016
Vision

The directional, motivational statement describing:

• Where does the organization want to be in the future
• How does it define success
• It should be optimistic, but possible, not utopian

Source: NESC Roundtable March 10, 2016
Mission and Vision Statements

Drive all that the organization does:

• Communications
  • Brand identity
  • Makes mission come to life
  • Essence of who the organization is
  • Emotion, passion, and conviction

Source: NESC Roundtable March 10, 2016
Mission and Vision Statements (cont.)

Drive all that the organization does:

• Services offered in alignment with mission
  • Critical criterion of existing and proposed services and enhancements
• Funds spent/impact measurement
  • Results hope to achieve
  • Difference intend to make

Source: NESC Roundtable March 10, 2016
Mission and Vision Statements (cont.)

Drive all that the organization does:

• Resource allocation to those areas that maximize impact on mission and vision

• Human resources
  • Board, staff and volunteers
  • Managed and supported to embody core values
  • Creating the culture

Source: NESC Roundtable March 10, 2016
Building Block

Core Values
Core Values
Core Values

Guiding Principles

Foundation

Identity

Association Culture

Behavior
“Values are definite truths that are the driving forces behind action, the instincts that influence choice, and the guiding lights on the path you are walking”

~ Anonymous
Purpose of Core Values

Forms the foundation within your association

Plays a defining role in member motivation and morale
Examples of Core Values

Loyalty
Professionalism
Dependability

Honesty
Integrity
Consistency

Positivity
Teamwork
Compassion
Core Values

Examples
<table>
<thead>
<tr>
<th>Respect</th>
<th>Compassion</th>
<th>Honesty</th>
<th>Actively listening and learning</th>
<th>Nutrition education</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advocacy Programs</td>
<td>Wise use of resources</td>
<td>Diversity</td>
<td>Leadership</td>
<td>Creativity</td>
</tr>
</tbody>
</table>
Integrity
Respect
Customer Satisfactions
Pursuit of Excellence
Change and Stewardship
Economic Equality

Equality of Rights

Democratic Process

Securing Civil Rights

Educate the Public
Fair Treatment  Volunteer  Community
Everyone Deserves to Eat  All People Need a Hand
Core Values
Building Block

Vision

Core Values
Vision Statement

Dream  Future  Aspire

Cause  Change
Writing a Vision Statement
Questions to Consider

What does the organization aspire to be?

What kind of change does the organization want to create?

What kind of change does the organization want to create?
Questions to Consider

What do you want your association to be recognized for?

What are the association’s hopes and dreams?

What does your association aspire to accomplish?
What Makes a Good Vision Statement?

Simple and Easy to Understand

5-14 words (20 max)

Memorable
Vision Statement Examples
We envision a community in which everyone has access to sufficient nutritious food.
A world in which every child attains the right to survival, protection, development and participation
Be recognized by the people and organizations we serve, as well as others in our field, as the provider of choice for blood, plasma and tissue services
To compassionately and responsibly create a more humane world for animals
To ensure a society in which all individuals have equal rights without discrimination based on race
To build a healthy community
To foster the most successful, well-adjusted generation of wounded service members in our nation’s history
Shaping the future by preserving our heritage, discovering new knowledge, and sharing our resources with the world
Vision Statement
Mission Statement
Building Block

Mission

Vision

Core Values
Purpose of a Mission Statement

- Serves as a filter to separate what is important from what is not
- Clearly state which market will be served and how
- Communicates a sense of intended direction to the entire organization
How a Mission Statement is Used

Guide each day’s activities and decisions

Primary standard to which the organization’s plans and programs should be evaluated
Writing a Mission Statement
Questions to Ask

What is the reason for being?

Who are we and what’s our purpose?

What do we do and who are we trying to serve?
A Mission Statement Should Have:

**Cause**
- Who? What?

**Impact**
- Changes for the better

**Actions**
- What we do
Mission Statement Examples
To create access to good, healthy food in every community
To inspire breakthroughs in the way the world treats children and to achieve immediate and lasting change in their lives.
To provide relief to victims of disasters and help people prevent, prepare for, and respond to emergencies
To engage the hearts, hands and minds of the community to help animals
To ensure the political, educational, social, and economic equality of rights of all persons and to eliminate race-based discrimination
To build community by providing nutritious and delicious meals to the people of Fort Collins regardless of their ability to pay while using mostly local, organic, and sustainably grown ingredients.
To honor and empower wounded warriors
For the increase and diffusion of knowledge among men
Mission Statement Checklist

- Easy to Understand
- Short and To the Point
- Useful and Focused
What to Avoid

- Industry specific lingo
- Too much focus on the organization
- Generalities, vague language
- Passive voice
- Formal language
Mission Statement
Strategic Plan and Strategic Budget
Strategic Plan

- Looks ahead to where the association wants to be in 3, 5 or even 10 years
- Designed with the association’s core values, vision, and mission statement in mind
- Considers the association’s strengths, weaknesses, opportunities and threats
- Serves as the framework for lower level planning
Organizing, Programs and Services

Are these in alignment with the core values, vision and mission of the association?

Does the association have sufficient resources to support the program or service?

Which programs and services provide the most value for members?
Strategic Budget

Planned allocation of association resources to accomplish mission set forth in the strategic plan

Is the benefit of the program worth the cost?

Use association resources strategically
2018-2020 Strategic Plan and Budget
Presented to the Representative Assembly July 2018
NEA Vision, Mission, Values

Page 1
NEA’s Core Values

Core Values

- Democracy
- Professionalism
- Partnership
- A Just Society
- Equal Opportunity
- Collective Action
Our vision is a great public school for every student
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.
The 2018-2020 Strategic Plan and Budget

Introduction (pg. 3 & pg. 4)
2018-2020 Strategic Framework

**Goal** (pg. 6)

To achieve our mission, and realize our vision of a great public school for every student, we, the NEA, will grow and strengthen our Association and promote quality public education by:

- advancing opportunities that will identify, organize, and engage new and early career educators; amplify the voices of all educators; support our members’ professional growth; and promote social justice for our students, our communities, and our nation;
- securing a pro-public education environment for students, educators, and families; and
- building the capacity of the local, state, and national union to ensure the success of public education.
2018-2020 Strategic Framework (cont.)

Strategic Objectives (pg. 6)

- Provide Professional Support
- Advance Racial Justice in Education
- Recruit and Engage New and Early Career Educators
- Increase Educator Voice, Influence and Professional Authority
- Secure the Environment to Advance the Mission of the NEA and its Affiliates
- Expand Organizational Capacity
Strategic Objective 6:

Enhance Organizational Capacity (pg. 25)

- Provide Professional Support
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Strategic Objective 6 (cont.):

Enhance Organizational Capacity (pg. 25)

• Organizing

• Technology

• Fiscal Health
  – Partnering with affiliates to achieve financial stability and sustainable fiscal health, improve the effectiveness of accounting and operating controls, and design and deliver effective financial training for staff, management, and leaders at all levels of the Association. (pg. 26)

• Leadership Development

• Partnerships
Strategic Objective 6 (cont.):

Fiscal Health (pg. 30)

3 Fiscal Health

1. Partner with affiliates to achieve financial stability and sustainable fiscal health, improve the effectiveness of accounting and operating controls, and design and deliver effective financial training for staff, management, and leaders at all levels of the association.

- Provide technical support and training to affiliate staff, management, and leaders to strengthen affiliates’ capacity to achieve financial stability and substantial fiscal health.
DEVELOPING THE NONPROFIT INFRASTRUCTURE

A Step-by-Step Guide on How to Write an Effective:
- Mission Statement
- Vision Statement
- Organization History, and
- Program Description

Amber Wynn, MSPA

Kindle $2.99
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Session Outcomes

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

• Guide your association to determine its core values
• Aide your association in creating its vision and mission statements
• Understand the importance of integrating core values, vision, and mission statements to create a comprehensive strategic plan and strategic budget
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