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

Supporting Strategic Decision-Making:
How to conduct a SWOT Analysis

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COMPETENCY: STRATEGY AND FISCAL HEALTH

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

• 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
  • Early Career Educator
  • Supporting Professional Excellence
Session Overview

• What, Whys & When of SWOT
• Where SWOT fits in a Strategic Management System
• Activity: Scan Environment & Identify Major Opportunities/Threats
• Activity: Clarify Strengths Weaknesses
• What to Do About Your Findings
• Activity: Your Ideas & Next Steps
• Discussion & Close
What is a SWOT Analysis?
Elements of a Strategic System
Mission, Vision, Core Values
Of educators believe they should have a lot of say in school decisions.

Of educators believe they have a lot of say in school decisions.

Want greater participation in school decision-making.

Want greater participation in district decision-making.

Gallup, 2018. Survey of K-12 teachers. Nationally representative sample, n=497. Comparison between teachers marking “a lot” as the response to each stakeholder’s current and desired level of input into school decision-making.

National Center for Education Information: Profiles of Teachers in the U.S. 2011
Responses of 2,500 randomly selected K-12 public school teachers in 2011:
“To what degree do you agree that the following changes would strengthen teaching as a profession? “
Theory of Success

Empowered Educators Shape Learning for All Students

Collaboratively Developed School Plans Centered on Student Learning

Focus on Locals & Members

Success of ALL students

Policies at District/State Level Defining Professional Practice

Practices and Strategies for Students

Public Support for Education
SWOT Analysis

STRATEGIC ANALYSIS

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

EXTERNAL
- OPPORTUNITIES: exploit; expand
- THREATS: avoid; thwart
Develop Goals & Plan

PURPOSE: What do our members need and want?

PLAN: How do we help them achieve it?

SWOT: What is our situation?

- **External**
  - Opportunities
  - Threats

- **Internal**
  - Strengths
  - Weaknesses

STRATEGY: What will we do about it?

- **Goals**
- **Operations**
Implement, Review & Learn

- Did We Do What We Said We Were Going To Do?
- What Impact Did We Make?
- What Did We Learn?
- What Did We Do Well? Not So Well?
- What Will We Do Differently To Accomplish Our Goals?
Has your association clearly articulated each of the components of a strategic system? If so, what are they? If not, what steps will you take in helping develop them?
(If you’re unsure, where can you go to find out? And how might your association be more transparent about its strategic processes?)
SWOT: How to Conduct?

- Interviews
- Literature Review
- Review Surveys & Secondary Data Sources
- Group Engagements
Step 1: Examine External Factors
Group Brainstorm:
Scan Your Environment

• Political
• Economic
• Social/Demographic
• Technological
• Legal
• Education

Fill out page 5 of your workbook with YOUR context as we do the next slide together.
Scan Your External Environment:

- POLITICAL
- ECONOMIC
- SOCIAL
- TECHNOLOGY
- LEGAL
- EDUCATION
Step 2: Identify Opportunities and Threats

What are the opportunities to seize to help them get what they need and want? What forces threaten or prevent them from getting what they need and want?

Look at the trends, and within that context, figure out...
NEA’s SWOT: Threats and Opportunities

- Threats
  - Hate
  - Racism
  - Discrimination
  - Bullying
  - Homophobia
  - Disablism

- Opportunities
  - Teachers Wanted
  - Red for Ed
  - Education
  - Please Help
Brainstorm: Identify Threats and Opportunities

Of the trends you explored, where are the opportunities for your association to seize? Which of them present threats to mitigate?

Fill out page 7 of your workbook.
Brainstorm: Assess Internal Capabilities

- Finances
- Human Capacity
- Membership
- Programs
- Reputation/Membership
- Technology

Fill out page 9 of your workbook.
Step 3: Identify Major Findings

Examples from a recent NEA SWOT:

- 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**
SWOT Findings: What to do?

- Increase Educator Voice & Agency
- Engage New Educators
- Advance Racial Justice in Education
- Provide Professional Supports
- Secure the Environment to Advance Mission
- Enhance Organizational Capacity
Brainstorm: Meaning-Making

Review what you’ve written thus far. What is clearer to you about where your association should go in the near future?

Fill out page 10-11 of your workbook.
SWOT: How might YOU use it?

Think  Pair  Share

Jot your thoughts down on page 12 in your worksheet as you chat.
Homework: Based on your learnings from this session, fill out page 13 in the workbook to make choices about how you’ll bring these skills to life back home in your own association.
Session Outcomes

It is our hope that by attending this session, you...

... understand how SWOT Analysis fits into an overall system for developing and honing goals

... are able to use SWOT Analysis as a process to analyze your environment, assess your capabilities, and make decisions about your 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