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

The Essential Strategic Plan

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COMPETENCY: STRATEGY AND FISCAL HEALTH

• NEA Leadership Competency progression level:
  • Level 3: Agenda Driving

• 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
What is a strategic plan?

• It’s a map from where you are to where you want to go

• A coordinated and systematic way to develop a plan and direction for your association
Elements of a Strategic System
Mission, Vision, Core Values
What does a strategic plan include?

• What your association is

• What your association does

• Why your association does the things it does
Components of a strategic plan:

• A mission statement!
• SWOT analysis!
• Strategies and tactics!
• Action plan!
• Budget and operating plans!
• Detailed monitoring and evaluation methods!
The journey begins...

The beginning of your amazing quest... to your strategic plan
The 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
The Mission Statement

The mission will more likely be successful if it is defined well, but too specific can be limiting

• The State Education Association wants the whole human race to achieve Nirvana (*Good luck with that!*)

• The State Education Association wants every math teacher in Harford County, Maryland to earn a 1.2% raise (*May limit future endeavors*)
The Mission Statement should have....

• The direction of the organization (vision)

• What the organization is going to do and for whom (mission)

• How to measure and guide the strategy to get to where you want to go (goals)
What is a SWOT Analysis?
SWOT Analysis

• Stands for strengths, weaknesses, opportunities, threats

• Two are internal - strengths and weaknesses

• Two are external - opportunities and threats

• Two are positive and two are negative
Strengths

• Vagueness - “we are wonderful at getting people to express their collective feelings about what can improve” which is a lot better than “we are wonderful”

• Is it really a strength? Do you wish it was a strength?
Weaknesses

• Does it involve assessing someone’s performance? Does that mean you may be blind to your own performance?

• Is it personnel or is it structural?

• Is it possible to get an outside opinion?
Opportunities

- Opportunities are not things that could be done

- Opportunities are things that already exist that could be used for the benefit of the association

- Be careful not to mask weaknesses as opportunities
Threats

Is the association facing more threats now, or less?
Strategy and Tactics

• Should be guided by the SWOT analysis
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**

Leadership Development

NATIONAL EDUCATION ASSOCIATION
Strategies

• For opportunities and threats (external) – these become goals

• For strengths and weaknesses (internal) - these become changes in operations

• Long term

• The path from where the association is today (the SWOT analysis) to the goal
Strategies (cont’d)

• Opportunities – the goals

• Use strengths to achieve the goals

• Does something need to change?
  • If the immediate answer is no, why hasn’t the goal been achieved yet?
  • The thing that needs to change is probably a weakness
Tactics

• Short term

• More concrete - smaller steps of the strategies

• How will we walk along the path we were talking about in the strategy? What will we need on that path?
Action Plans

• This is where to lay out exactly what the association is going to do

• Solves the most basic, and yet probably most common pitfall of strategic planning – most strategic plans aren’t implemented!
Action Plans (cont’d)

The action plan should have 3 things:

• Specific tasks: what will be done and by whom

• Time horizon: when will it be done

• Resource allocation: which specific funds are available for specific activities
Benchmarks for Evaluation of Action Plans

• This isn’t just a list
• Action plans will likely use a tactic to achieve a goal, or improve an operation to make a tactic work
• If a tactic doesn’t work, how will the association try and achieve the goal?
Step 1:

What are the actions in the plan?
Step 2:

- What will the action plan cost? *Nothing is free!*
  - Saying that we’re going to organize using the existing staff is apportioning the money you have to spend for staff

- How much time is the action plan going to take?

- What supplies will be needed? *This is the cost of the organizing campaign*
Step 3:

• Will the action plan generate revenue? *Remember members = revenue*

• If it’s a different kind of initiative, is there the chance for grant money?
Step 4:

• Match the costs to the revenues
  • This is the return on investment (ROI)
  • Is it a net gain or a net loss?
  • If a net loss, can the association afford to undertake the net loss?
  • Does the association need to find a way to increase revenues?
Detailed Monitoring and Evaluation of the Action Plans

For those of you into philosophy, consider the following:

Every tactic has only one way to succeed, but a bunch of different ways to fail.
Detailed Monitoring and Evaluation of Action Plans (cont’d)

• Need to reevaluate because there are not enough backup plans to account for the potential failures (doesn’t mean you shouldn’t try, though)

• Not only does the “what failed” impact the actions taken down the line, but “why it failed” may require a reevaluation of things from further up the plan
  • Is the supposed strength actually a strength?
  • Is it actually an opportunity and Is it still achievable?
Timing, Tactics, and Action Plans

- How much does timing play into the action plan?
- What will having to do a tactic longer mean for the timing?
- Is the outcome time sensitive?
- Are any of the other tactics in the action plan?

- To some extent people’s time is already committed. If a key portion of an action plan is delayed, will that mean that a person is doing two jobs at once?
Detailed Monitoring and Evaluation of Action Plans (cont’d)

• Specificity is key!

• Just as specificity is key in defining success, it will also help define failure!
  • Success and failure is often a grey area to define
  • If your target is 80% membership saturation in district [X], is 75% a failure?
Detailed Monitoring and Evaluation of Action Plans (cont’d)

• Important to define the actual point at which the next tactic becomes impossible

• Example: The tactic requires $30,000 for the next phase
  • How many members are required before the tactic will not have resources available to support it?
    • Are there metrics tied to the goals?
    • Why were the metrics chosen?
    • Do the chosen metrics assist in evaluating the success or failure of the tactic?
When to Monitor?

• Every day? - Reporting takes time and costs money!

• Before each tactic? Probably smart

• Every board meeting?

• At a minimum – which budget item is an output of a previous tactic?
Things to Monitor

• Time

• Revenue

• Expenses

• Membership

• Others?
Any questions?
Contact Information

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Session Outcomes

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

• Understand how to execute a coordinated and systemic way to develop a course and direction for your Association

• Understand how SWOT Analysis feeds into your Association’s strategies and tactics

• Understand how to develop action plans and evaluate and monitor these plans
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