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

Pre-Summit Webinar
Effective Policymaking for Leadership
Thursday, March 11, 2019 8:00-9:00 pm (ET)

Conference Call Number: 1-800-289-0438  Participant Code: 3378367
http://neaorg.adobeconnect.com/summit/
National Education Association

Rebecca “Becky” Pringle
Vice President
Purpose of the Summit

To develop activist leaders and prepare them with the knowledge, skills, and abilities necessary to lead relevant, thriving associations and to lead in their professions.
Agenda

Princess Moss
NEA Secretary-Treasurer and Chairperson of the Committee on Program and Budget

Shannon McCann
Chairperson, NEA Board Strategic Committee on Legislation

Cindy Hoyt
Chairperson, NEA Standing Committee on Resolutions
Leadership Competencies

**ADVOCACY**
Advances the cause of public education through social justice and how it benefits our students and members' professional needs and rights.

**COMMUNICATION**
Builds an integrated communications strategy that drives the goals of our professions.

**GOVERNANCE AND LEADERSHIP**
Sets the mission and establishes strategies necessary for a relevant and thriving organization; empowers, motivates, and fosters a pipeline of talent for the future.

**LEADING OUR PROFESSIONS**
Advocates for quality inside our professions and promotes our union's role in advancing education transformation and student learning.

**ORGANIZING**
Mobilizes to influence successful organizing outcomes, strengthen internal and external relationships, and membership capacity; recruit and identify new members and potential leaders into the Association.

**STRATEGY AND FISCAL HEALTH**
Builds the brand and accomplishes the goals of the Association through effective financial management and understanding of fiduciary responsibilities.
Budget Strategy and Plan Development

Princess Moss
NEA Secretary-Treasurer
# STRATEGY AND FISCAL HEALTH

Use Association resources responsibly to accomplish the goals of the Association through strategic thinking, effective financial management and understanding of fiduciary responsibilities.²⁹

<table>
<thead>
<tr>
<th>Competency Theme</th>
<th>Level 1: Foundational</th>
<th>Level 2: Mobilizing and Power Building</th>
<th>Level 3: Agenda Driving</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acts strategically to align the Association’s work with member needs</td>
<td>Understands how the Association’s vision, mission, and core values serve as a framework to support diversity amongst its members and member programs. Training Considerations: Learns to formulate the beginnings of a strategic plan by assessing the Association’s vision, mission, and core values for inclusivity of all members. Creates a mission statement to serve as the foundation of the Association’s strategic plan. Explores the next steps in completing a strategic plan representative of the diverse member population.</td>
<td>Assesses the strengths, weaknesses, opportunities, and threats of the Association, including the use of an equity audit tool. Training Considerations: Learns how to perform an assessment of the strengths, weaknesses, opportunities, and threats (SWOT) facing the Association to inform the development of the Association’s strategic plan. Understands the role of equity in assessing the needs of members, students, and the broader community.</td>
<td>Develops strategic plans to align changing member demographics and evolving member needs with an emphasis on programs that support diversity through new business models. Training Considerations: Learns how to incorporate the Association’s vision, mission, and core values along with the assessment of the Association’s strengths, weaknesses, opportunities, and threats in order to formulate a strategic plan that supports the needs of members, as well as the long-term financial health for the Association.</td>
</tr>
<tr>
<td>Understands the interdependence of strategic planning, budget development, and business policy</td>
<td>Utilizes the Association’s strategic plan to create a strategic budget that is inclusive of funding to support member diversity and diverse programs. Training Considerations: Learns strategic budgeting basics for maintaining fiscal health.</td>
<td>Promotes a culture that recognizes the importance of fiscal responsibility; ensures Association bylaws, other governing documents and policies support financial health. Training Considerations: Learns the importance of regularly reviewing and updating bylaws and policies and establishing reserves to support the strategic plan and budget, as well as, overall financial health.</td>
<td>Evaluates the effectiveness of strategic plans using outcome based goals and metrics, actual to budget financial results, and the effectiveness of Association policies to ensure long-term sustainability of the Association. Training Considerations: Gains an understanding of how to review actual to budget financial results, and whether strategic plans need modification to take advantage of opportunities or to mitigate unforeseen losses.</td>
</tr>
<tr>
<td>Promotes stewardship and financial integrity of the organization</td>
<td>Recognizes the fiduciary responsibility for safeguarding Association assets and demonstrates integrity in all financial transactions. Training Considerations: Learns the fiduciary responsibilities that all leaders are legally obligated to perform on behalf of the Association and its members, in an effort to be good stewards of the Association’s reputation and assets. Learns how a code of ethical conduct, conflict of interest, and whistleblower policies, as well as an audit committee, promotes an ethical culture and deters fraud.</td>
<td>Adopts financial best practices that support and strengthen Association fiscal health. Training Considerations: Learns how to implement basic internal controls, as well as policies and procedures that reduce the chances of fraud in the Association. Gains tools, such as a monthly bank reconciliation workbook, to implement as part of an internal control system.</td>
<td>Identifies Association legal and compliance requirements and ensures obligations fulfilled to maintain the reputation of the Association. Training Considerations: Gains an understanding of legal and compliance requirements to ensure the Association is in good standing with federal and state regulators, and the Association’s reputation remains protected.</td>
</tr>
</tbody>
</table>
Competency: Strategy and Fiscal Health

Understands the interdependency of strategic planning, budget development, and business policy.

• **LEVEL ONE - FOUNDATIONAL**: Utilizes the Association’s strategic plan to create a strategic budget that is inclusive of funding to support member diversity and diverse programs

• **LEVEL TWO – MOBILIZING AND POWER BUILDING**: Promotes a culture that recognizes the importance of fiscal responsibility; ensures Association bylaws, other governing documents and policies support financial health

• **LEVEL THREE - AGENDA DRIVING**: Evaluates the effectiveness of strategic plans using outcome based goals and metrics, actual to budget financial results, and the effectiveness of Association policies to ensure long-term sustainability of the Association
Any plan & budget is only as good as the effort and information people put into it.

Good planning practices should foster collaboration and exchange of information among participants.

No plan is perfect because none of us can totally predict the future.

In order to reach the goals, plans & budget must be monitored and adjusted as time goes on.

Plan & Budget Development: 4 BASIC RULES
THOUGHTFUL AND DELIBERATE INCLUSIVE

PLANNING & BUDGETING CHARACTERISTICS
An Overview of the NEA Strategic Plan & Budget Development
2018-2019 BUDGET COMMITTEE

James Frazier, New Jersey
Amber Gould, Arizona
Gina Harris, Illinois
Doug Hill, Michigan
Lori Steiniker, Idaho
Kathy Vetter, Wyoming
Becky Pringle, Vice-President
Princess Moss, Secretary-Treasurer (Chair)
NEA HIERARCHY of CHOICES
For Planning

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

Area of Focus
Mission
Vision
Strategy
Tactics
Activities

Who?
Why?
What?
How?
Which?
2019-2020 MODIFIED STRATEGIC PLAN AND BUDGET FRAMEWORK

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

ENTERPRISE OPERATIONS

OPPORTUNITY
GROWTH
STRENGTH
CAPACITY
DEFENSE
Membership Trends Post Janus: An Early Look

- Surprising Results
- Only 33,000 FTE Loss
- Best Case Scenario
2019-2020 Modified Budget Key Priorities

- President 2020 Election/ New American Majority
- Reinvest in Growth and Strength
- Legal Defense
- Infrastructure- Technology
2019-2020 Modified Budget Development Timeline

**SEPTEMBER - MARCH**
- Budget development inclusive of Budget Committee Meetings and stakeholder engagements

**APRIL**
- Final proposals for balanced budget submitted to Budget Committee

**MAY**
- Budget Committee present to Board of Directors for recommendation to the RA

**JUNE**
- Virtual Open Hearing on Budget

**JULY**
- Modified Budget presented at the Representative Assembly
NEA Year-Round Organizing

New Educator Campaign

Winter Worksite

Education Summer

Early Enrollment
STRATEGIC QUESTIONS

What are the top two (three) strategic priorities in your local affiliate this year?

How do you plan to measure success in achieving your priorities?

How have you made connections between these priorities and the NEA Strategic Plan?

How are you making these priorities a part of everybody’s work in your affiliates?

www.nea.org/budgetinput
POLL QUESTION

In engaging our members all year long, we found that three priorities rose to the top:

A. Local Capacity Building
B. Membership Organizing
C. Continued Fiscal Prudence

Which of these three priorities speak to you?
Questions

By phone, press *1 to ask a question or *2 to be removed from the queue.

By computer, click and type in your question in the Q&A box (far right), press the return key to submit your question.
Shannon McCann, Chairperson
NEA Board Strategic Committee on Legislation
**ADVOCACY**

Advances the cause of public education through advocacy for students including addressing racial and social justice in education and how it benefits our students and members’ professional needs and rights.

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<td><strong>Utilizes best practices in advocacy and political efforts</strong></td>
<td>Identifies and discusses fundamentals of advocacy practice and theory</td>
<td>Engages self and activists in high-impact activities that produce racially and socially just policies and culturally competent advocacy plans and strategies</td>
<td>Ensures best practices are integrated into plans for future endeavors and Association’s goals</td>
</tr>
<tr>
<td><strong>Training Considerations</strong></td>
<td>Provides key concepts and material that prepare participants to advocate on behalf of public education in a manner that garners widespread support; acquires information and enhances skill to identify issues to help them build relationships/partnerships with diverse communities</td>
<td>Provides opportunities to engage in power mapping to help participants understand how to alter the power dynamics to win for each student. It necessitates a recognition of a variety of levers and groups that represent diverse communities. Through learning how to conduct equity assessments, it helps develop strategies and tactics to secure the support of key decision makers</td>
<td>Training Considerations Develops strategies to maximize advocacy practices and build diverse partnerships that are well integrated into strategic plans that will increase educator advocacy engagement</td>
</tr>
<tr>
<td><strong>Engages and builds mutually beneficial relationships to advance advocacy and political goals</strong></td>
<td>Learns issues to better understand content; shares key messages with members, the community and partners</td>
<td>Creates and implements with others advocacy plans that support student learning, especially for those students most in need; addresses racial and social justice in education</td>
<td>Organizes collaboratively with community partners around shared interests of the Association and communities</td>
</tr>
<tr>
<td><strong>Training Considerations</strong></td>
<td>Learns key concepts and material that prepare participants to work with diverse communities to garner support for public education; develops skills that help them build relationships/partnerships with communities and serve as a resource to assist with meeting education challenges that impact the entire school community</td>
<td>Engages with students and builds relationships that support student learning and leads the profession; provides an opportunity for developing critical skills in helping to perform equity assessments to address policies and practices that are unjust</td>
<td>Training Considerations Provides a process that will help with understanding and developing strategies on how to maximize areas of influence and build strategic partnerships with others (unions, community partners, partner organizations, and legislative entities) to enhance student outcomes, build stronger schools and increase educator engagement and activism</td>
</tr>
<tr>
<td><strong>Interprets and acts on social and racial justice initiatives</strong></td>
<td>Understands and discusses the impact of educational practices and policy on students and the profession using a racial and social justice lens</td>
<td>Designs and analyzes advocacy plans and strategies and their impact on educational practices, policies, students and the profession using a racial and social justice lens</td>
<td>Analyzes and strengthens alliances with a diverse and inclusive set of stakeholders to implement, support, evaluate, communicate and sustain racial and social justice</td>
</tr>
<tr>
<td><strong>Training Considerations</strong></td>
<td>Expands understanding of the intersection of policies and practices and racial and social justice principles and explores how to effectively apply a racial and social justice lens (race equity lens) at all levels of the Association especially when attempting to build relationships with the community; develops knowledge, skills and self-awareness while deepening their appreciation of the distinct experiences of individuals and groups and associated power dynamics. Strengthen understanding of the importance of the value proposition of the Association and identifying issues</td>
<td>Explores how the application of a racial and social justice lens (race equity lens) at all levels of the Association especially when attempting to build relationships with the community; develops knowledge, skills and self-awareness while deepening their appreciation of the distinct experiences of individuals and groups and associated power dynamics. Strengthen understanding of the importance of the value proposition of the Association and identifying issues</td>
<td>Training Considerations Builds on participants’ knowledge of the principles of racial and social justice and building alliances and identifying resources will assist with engaging stakeholders to support and communicate the principles of racial and social justice at the school/local, Association and community level. At all levels, it is essential to understand how to apply these principles when confronted with social oppression including strategies to communicate courageously about racial and social injustice</td>
</tr>
</tbody>
</table>

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1 A race equity lens is a transformative approach used to inform and improve planning, decision making, analysis, actions and resource allocation that leads to more racially equitable and socially just policies, programs and practices. (Fahlin – The intentional inclusion and recognition of every individual and the many cultural identities they navigate (e.g., race, ethnicity, gender, sexual orientation, religion, ability and employment job category). Diverse – Representative of the experiences and cultural identities of individuals and community (e.g., race, ethnicity, gender, sexual orientation, religion, ability and employment job category).
Competency: Advocacy

Leads public education policy reform

• **LEVEL ONE - FOUNDATIONAL**: Understands and reports on emerging local, state, and national public education policy and reforms

• **LEVEL TWO – MOBILIZING AND POWER BUILDING**: Engages and persuades a diverse group of stakeholders to support shared interests in local, state, and national public education policy and reforms

• **LEVEL THREE - AGENDA DRIVING**: Develops credentials and experience in advocacy and collaborates to draft local, state, and national public education policy and reforms
NEA Legislative Program — What is it?

- Foundational component of your Advocacy Leadership Competency in advancing our students and members’ needs and rights
- A guide for NEA and the GR team to engage communities and legislative bodies
- Impacts our lobbying efforts and allows NEA to work hard to support and help pass legislation, or defeat legislation.
- Being involved in crafting the Legislative Program is crucial to ensuring our students’ and members’ voices are heard on Capitol Hill.
## CONTENTS

- Report of the Board Strategic Committee on Legislation
  - Legislative Proposal of the 117th Congress, Revised Status

### 1. Quality Public Education
- Federal Laws, Goals, and Initiatives
- School Finance and Accountability
- Teacher Preparation and Professional Development
- Student Performance and Achievement
- Parent, Family, and Community Engagement
- School Facilities and Student Safety

### 2. Strengthening Children’s Rights
- Children’s Well-Being
- Child Protection
- Child Development
- Youth Development
- Violence Against Children

### 3. A Voice to the Vulnerable
- Federal Policies for Vulnerable Populations
- Health Care Reform
- Social Security
- Immigration Reform
- Veteran Assistance

### 4. Public Health Policy
- Public Health and Safety
- Health Care Reform
- Youth and Children’s Rights

### 5. Fiscal Policies
- Federal Revenue and Spending
- Economic Policies
- Budget and Fiscal Policy

- Legislative Progress as of February 2023
e. Safe Schools

NEA supports:

• a ban on the sale to the public of military and auto loading firearms with a capacity of firing 10 rounds or more from a single clip;
• significant penalties for criminal actions involving use of guns or other weapons;
• restrictions, including a mandatory waiting period or instantaneous computer checks to allow universal background checks for felony convictions or mental illness, on the manufacture, distribution, and/or sale of guns in order to ensure a safer school environment;
• federal assistance for the development and implementation of a unified school safety crisis prevention/awareness plan;
• federal legislation to outlaw gun trafficking and “straw purchases”;
• federal assistance to help develop emergency response systems for schools;
• legislation that protects students and staff from bullying, harassment, and intimidation by other students and staff;
• lifting the ban that prevents the Centers for Disease Control and Prevention from conducting research on gun violence in this country;
NEA Legislative Program — Process

• The Program is amended by the Legislative Committee, amendments proposed through the Policy Resource Center, and by delegates at the Representative Assembly.

• The Committee reviews amendments and recommends the Program to the Board, who then send the Program to the RA.

• The delegates of the RA may further amend the Program.
Legislative Program and Other Policy Resources

NEA Policy Resource Center on NEA.org

• [www.nea.org/policyresourcecenter](http://www.nea.org/policyresourcecenter)

• [www.edadvocacy.nea.org](http://www.edadvocacy.nea.org)
Cindy Hoyt, Chairperson
NEA Resolutions Committee
# GOVERNANCE AND LEADERSHIP

Sets the mission and establishes and monitors strategies necessary for a relevant and thriving Association while empowering, motivating, and fostering a pipeline of diverse leaders.¹

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<td>Effectively execute governance and leadership responsibilities</td>
<td>Understands the roles and responsibilities of various leadership positions as well as the specific duties and legal obligations of governance Training Considerations</td>
<td>Creates trusting relationships and builds consensus among leaders on governance activities and strategic objectives Training Considerations</td>
<td>Executes, monitors, and adjusts plans, policies, and strategies to accomplish the short- and long-term objectives of the Association Training Considerations</td>
</tr>
<tr>
<td>Establishes and maintains collaborative and effective relationships</td>
<td>Establishes purposeful relationships to foster collaboration Training Considerations</td>
<td>Builds and maintains productive internal and external relationships: Training Considerations</td>
<td>Leverages internal and external relationships to form authentic partnerships and utilizes those partnerships to accomplish strategic objectives Training Considerations</td>
</tr>
<tr>
<td>Advances the organization by internalizing its vision, mission, and core values</td>
<td>Uses the purpose, culture, and history of the organization, as well as education and union trends to influence the direction of work Training Considerations</td>
<td>Empowers others and promotes a culture that appeals to the different motivations of members while recognizing the contributions of all</td>
<td>Implements strategies that utilize the vision, mission, and core values to drive work and culture Training Considerations</td>
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¹ A race equity lens is a transformative approach used to inform and improve planning, decision-making, analysis, actions and resource allocation that leads to more racially equitable and socially just policies, programs and practices. Each individual’s identity is the intersection of race, gender, disability, socioeconomic status, and age, and each dimension of identity has an impact on lived experience. A race equity lens involves looking at the world as it is, rather than as it was; seeks to frame the world as it is, rather than as it was. It understands that discrimination and biases persist and violate the core values of the organization.

Training Considerations

- Understand the levels of influence, the power of servant leadership and importance of succession planning. Understands the basics of strategic action planning: the fundamentals of developing and leading high performing teams that reflect a diverse Association; how to set priorities and make decisions under pressure; and how to course correct when needed.

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5 A race equity lens is a transformative approach used to inform and improve planning, decision-making, analysis, actions and resource allocation that leads to more racially equitable and socially just policies, programs and practices. Each individual’s identity is the intersection of race, gender, disability, socioeconomic status, and age, and each dimension of identity has an impact on lived experience. A race equity lens involves looking at the world as it is, rather than as it was; seeks to frame the world as it is, rather than as it was. It understands that discrimination and biases persist and violate the core values of the organization.
Competency:
Governance and Leadership

Advance the organization by internalizing its mission, vision, and core values.

• LEVEL ONE - FOUNDATIONAL: Use purpose, culture, and history of organization as well as education and union trends to influence direction of work.

• LEVEL TWO – MOBILIZING AND POWER BUILDING: Empower others and promotes culture that appeals to different motivations of members while recognizing the contributions of all.

• LEVEL THREE - AGENDA DRIVING: Implement strategies that utilize mission, vision, and core values to drive work and culture.
NEA definition of “Resolution”

• Expressions of opinion, intent, belief, or position.
• General in concept, clear and concise in language.
• Broad in nature, positively stated, and without ambiguity.
Constitution of the National Education Association of the United States

Preamble

We, the members of the National Education Association of the United States, in order that the Association may serve as the national voice for education, advance the cause of public education for all individuals, promote the health and welfare of children and/or students, promote professional excellence among educators, gain recognition of the basic importance of the teacher in the learning process and other employees in the educational effort, protect the rights of educational employees and advance their interests and welfare, secure professional autonomy, promote, support and defend public employees’ right to collective bargaining, unite educational employees for effective citizenship, promote and protect human and civil rights, and obtain for its members the benefits of an independent, united education profession, do hereby adopt this Constitution.
Navigating NEA Resolutions

H. UNITE EDUCATION EMPLOYEES FOR EFFECTIVE CITIZENSHIP .................................82

CITIZENSHIP RIGHTS ........................................................................................................82
  H-1. U.S. Constitution ........................................................................................................82
  H-2. The Education Employee as a Citizen ....................................................................82
  H-3. The Right To Vote .....................................................................................................82
  H-4. The Role of the Press in a Democracy ....................................................................83
  H-5. Participation in Professional Associations ...............................................................83
  H-6. Member Involvement in Community Organizations ..............................................83
  H-7. The Right To Know ...................................................................................................83
  H-8. Economic Fairness in a Democracy ......................................................................83
  H-9. National Health Care Policy ...................................................................................83
  H-10. Statehood for the District of Columbia .................................................................83

CITIZENSHIP RESPONSIBILITIES ....................................................................................83
  H-11. Environmental Responsibility .............................................................................83
  H-12. Energy Programs ....................................................................................................84
  H-13. Historic Preservation .............................................................................................84
Navigating NEA Resolutions

H-1. U.S. Constitution .................................................................................................................. 82
H-2. The Education Employee as a Citizen....................................................................................... 82
H-3. The Right To Vote.................................................................................................................... 82
H-4. The Role of the Press in a Democracy ...................................................................................... 83
Recently Adopted or Revised Resolutions

Citizenship Rights

• H-4. The Role of the Press in a Democracy (2017)
• H-7. Economic Fairness in a Democracy (2016)

Racial and Social Justice

• I-50. White Supremacy Culture (2018)
• I-52. Hate-Motivated Violence (2018)
Proposed Amendments (Fall-Winter-Spring)

Committee completes recommendations to RA (July 3)

Resolutions Report to NEA Representative Assembly (July 6)

Resolutions Committee Winter Meeting (March 7-9)

Open Hearing for NEA Delegates (June 20)

Resolutions Committee Summer Meeting (July 2-3)

Resolutions – Annual Cycle
Policy Statements

- Privatization and Subcontracting Programs (2000)
- Teacher Evaluation and Accountability (2011)
- Digital Learning (2013)
- Discipline and the School-to-Prison Pipeline (2016)
- Charter Schools (2017)
- Community Schools (2018)
Resolutions Input

NEA Policy Resource Center on NEA.org

www.nea.org/policyresourcecenter
Questions

By phone, press *1 to ask a question or *2 to be removed from the queue.
By computer, click and type in your question in the Q&A box (far right), press the return key to submit your question
Upcoming Opportunities
See you at the Summit
March 15-17 • Denver • Colorado Convention Center
THANK YOU!