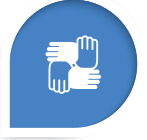


ADVOCACY



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 rights¹.

Competency Theme	Level 1: Foundational	Level 2: Mobilizing and Power Building	Level 3: Agenda Driving
Utilizes best practices in advocacy and political efforts	<p>Identifies and discusses fundamentals of advocacy practice and theory</p> <p>Training Considerations 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</p>	<p>Engages self and activists in high impact activities that produce racially and socially just policies and culturally competent advocacy plans and strategies</p> <p>Training Considerations 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 leaders 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</p>	<p>Ensures best practices are integrated into plans for future endeavors and Association's goals</p> <p>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</p>
Engages and builds mutually beneficial relationships to advance advocacy and political goals	<p>Learns issues to better understand content; shares key messages with members, the community and partners</p> <p>Training Considerations 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</p>	<p>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</p> <p>Training Considerations Creates opportunities to craft and implement advocacy plans that assist participants with brokering, navigating and leveraging community partnerships/relationships that support student learning and leads the professions; provides an opportunity for developing other's skill in learning to perform equity assessments to address policies and practices that are unjust</p>	<p>Organizes collaboratively with community partners around shared interests of the Association and communities</p> <p>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 other unions, community partners, partner organizations, and legislative entities to enhance student outcomes, build stronger schools and increase educator engagement and activism</p>
Interprets and acts on social and racial justice initiatives	<p>Understands and discusses the impact of educational practices and policy on students and the profession using a racial and social justice lens</p> <p>Training Considerations 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; strengthens understanding of the importance of the value proposition of the Association and identifying issues</p>	<p>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</p> <p>Training Considerations Explores how the application of a racial and social justice lens (race equity lens) when 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</p>	<p>Analyzes and strengthens alliances with a diverse and inclusive set of stakeholders to implement, support, evaluate, communicate and sustain racial and social justice</p> <p>Training Considerations Builds on participants' knowledge of the principles of racial and social justice to recognize the impact of racial and social injustice on students and educators. Develop strategies and a plan of action to determine the necessary steps needed to address social oppression in education at the workplace or Association and/or in school policies and practices</p>

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Competency Theme	Level 1: Foundational	Level 2: Mobilizing and Power Building	Level 3: Agenda Driving
Leads public education policy reform	<p>Understands and reports on emerging local, state, and national public education policy and reforms</p> <p>Training Considerations Expands understanding of local, state, and national public education policy and reforms, and how education policy and reforms are critical to students, the Association, and larger community; increases awareness of internalized, interpersonal, and systemic racism</p>	<p>Engages and persuades a diverse group of stakeholders to support shared interests in local, state, and national public education policy and reforms</p> <p>Training Considerations Explores ways to engage and garner broad and diverse support for local, state, and national public education policy and reforms, applying a race equity lens, that lead legislative entities to enhance student outcomes, build stronger schools and advocacy/activism</p>	<p>Develops credentials and experience in advocacy and collaborates to draft local, state, and national public education policy and reforms</p> <p>Training Considerations Builds on knowledge and experience in advocacy that will foster collaboration in the drafting of local, state, and national public education policy and reforms that are critical to the Association and support student learning and lead the profession; uses leadership to position the Association to affect systemic change on public education policy</p>
Acts as a political advocate	<p>Participates in advocacy and political campaign actions, including donating to political action committees, canvassing, phone calling, emailing, petition signing and other activities; encourages other members to become involved</p> <p>Training Considerations Gains an understanding of who makes political decisions and how to hold them responsible for their actions or inaction. Learns the fundamentals of political campaigns and take actions that can impact political outcomes; understands the impact of decisions on diverse groups and the larger community</p>	<p>Equips members to become more effective advocates for themselves and others by getting them involved in the political process (at the level that makes sense for them) and provides valuable education, information and research. Connects legislative advocacy to the political process</p> <p>Training Considerations Learns tactics of an integrated campaign and how member engagement/activism enhances the overall program. Challenges participants to take higher level actions</p>	<p>Takes a high level leadership role in Association, civic organization, Political Action Committee, campaign, and/or runs for office. Engages the general public around critical issues for students and public education in political campaigns</p> <p>Training Considerations Gains refined tools to take charge of political efforts and or run for office; understands the importance of recruiting diverse volunteer activists. Learns how to focus to lead and organize others; and direct or recruit others to be political activists</p>
Makes strategic plans that are data driven and uses analysis and metrics to achieve key advocacy and political goals ²	<p>Understands core data principles and the importance of using data to secure political power and advocacy wins</p> <p>Training Considerations Learns what data is, why it is used to improve Association programs, and the life cycle of data</p>	<p>Uses data and analytics to inform advocacy and political strategies</p> <p>Training Considerations Creates plans, determines metrics, and plan reporting. Learns concepts like theory of change and pirate metrics</p>	<p>Uses lessons learned, both qualitative and quantitative, from past campaigns to inform future initiatives</p> <p>Training Considerations Explores importance of long-term goal setting, cultural impacts of long-term planning, and logistical realities from a data perspective</p>

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COMMUNICATION



Build and execute an integrated communications strategy that drives the mission, vision, core values and strategic goals of the Association.³

Competency Theme	Level 1: Foundational	Level 2: Mobilizing and Power Building	Level 3: Agenda Driving
Develops a two-way strategic communications plan that focuses on research, planning, implementation and evaluation of communications	<p>Learns the fundamentals of how to develop a focused, communications plan based on research, planning, implementation, and evaluation</p> <p>Training Considerations Learns communication theory and its application to the development of a communication strategy. Gains an understanding of what drives a communication strategy and how it is one component of a larger communications planning process</p>	<p>Develops and implements a strategic communications plan with effective messaging and vehicles for the unique needs of diverse constituencies</p> <p>Training Considerations Learns how to build audience-specific, message-driven, research-based, linguistically diverse, measurable communications plans to drive Association mission, goals, and priorities. Builds a framework for their Association's communications plan and receive examples of successful communication plan components that will resonate with diverse audiences</p>	<p>Implements a differentiated communication plan that rallies a diverse set of stakeholders to take action and further the goals of the Association and its members</p> <p>Training Considerations Learns how to apply communication theory and a four-step process—research, planning, implementation, and evaluation—of communication into action. Continues communication planning work back home and implements the communication plan</p>
Develops individual communication approach and style to fit appropriate audience	<p>Understand the various approaches and styles needed to communicate with diverse audiences</p> <p>Training Considerations Learns individual communications skills assessments (such as HRDQ and SVSS) to identify and learn more about the participant's own communications style, strengths, and limitations. Learns how one's individual communications style adjusts depending on the situation and audience (and importance of inclusive approaches that appeal to all individuals) and importance of listening to understand vs. listening to respond</p>	<p>Tailors communications to appeal to different audiences; adjusts the purpose, substance and style</p> <p>Training Considerations Explores how to use shared values, beliefs, and opinions to further resonate with an audience through communication. Learns how to tailor one's individual communications style and strengths to multiple audiences, while staying on Association messages. Develop communication approaches that are effective for racial and social issues</p>	<p>Develops skills to address hostile audiences, defeat challengers, and influence constituents and partners</p> <p>Training Considerations Engages advanced practice and simulated presentations and media interviews. Uses real-world situations or examples, to prepare and rehearse for a difficult audience. Learns the important role of interpersonal communications in leadership</p>
Acts as an effective speaker	<p>Demonstrates effective public speaking and presentation skills for a variety of audiences</p> <p>Training Considerations Learns the basics of interpersonal communication, public speaking and media training. Gains an understanding of how to be an effective communicator in a variety of settings, with an emphasis on the leader as communicator. Emphasis placed on learning the basics on how to prepare and write for public speaking</p>	<p>Delivers engaging and persuasive speeches, presentations, and media interviews that motivate audiences to take action</p> <p>Training Considerations Learns how to build a speech, prepare for a media interview, and other situations in which the leader is serving as communicator for the Association. Engages hands-on work using the NEA Message Framework to develop a simple, three-part message that can be used in an interview or speech. Through role playing, practice, and simulated "on-camera" interviews, participants will practice what they've learned</p>	<p>Acts as a powerful and passionate speaker who can influence agendas and systemic change</p> <p>Training Considerations Engages advanced methods for public speaking and media interviews. Provides additional critique and learning opportunities from participants' own examples of speeches or media interviews they have conducted</p>

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Competency Theme	Level 1: Foundational	Level 2: Mobilizing and Power Building	Level 3: Agenda Driving
Effectively uses current media (<i>print, broadcast, online, social media</i>) to communicate	<p>Understands the communications value of current media such as print, broadcast, online and social media</p> <p>Training Considerations Explores the current communication landscape as it applies to the Association, its members, and to external audiences. Learns the basics on how to employ earned media, paid media, online media, broadcast media, and social media to successfully deliver Association messages successfully to target audiences</p>	<p>Develops and implements strategic and integrated engagement plans, that utilize a variety of media, technology and social networks</p> <p>Training Considerations Learns how to best use earned media, paid media, online media, broadcast, and social media in the Association's overall communication plan. Examines how to match the medium to the message and determine which forms of media are best for members and external audiences. They will continue work following the session to finalize and implement their integrated communications plan</p>	<p>Evaluates and adjusts communications plans for maximum effectiveness</p> <p>Training Considerations Engages the tools and practice of how to best measure and evaluate the success of various forms of media chosen in the communications plan. Learns how best to measure and evaluate before, during, and after completion of any communication campaign or plan and how to make corrections and improvements</p>
Identifies and utilizes appropriate messages in acting as a compelling advocate for the organization⁴	<p>Understands appropriate messages and identifies messengers</p> <p>Training Considerations Examines the Association's message framework and how to best connect with specific audiences such as members, voters, communities, and parents. Learns the importance of messages and messengers that appeal to diverse audiences</p>	<p>Empowers change, fortifies networks and builds coalitions by forging emotional connections with audiences</p> <p>Training Considerations Explores how to develop and apply common beliefs, values, mission and messaging of the Association with coalition partners. Emphasis is placed on the importance of identifying, developing and partnering with individuals/organizations from diverse backgrounds and experiences</p>	<p>Utilizes a variety of messages and message delivery systems to successfully impact change and advocate on behalf of constituents and organization</p> <p>Training Considerations Learns message-based strategies that not only build coalitions but also unite sometimes disparate audiences around the Association's key mission, vision, and goals</p>

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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.⁵

Competency Theme	Level 1: Foundational	Level 2: Mobilizing and Power Building	Level 3: Agenda Driving
Effectively executes governance and leadership responsibilities	<p>Understands the roles and responsibilities of various leadership positions as well as the specific duties and legal obligations of governance</p> <p>Training Considerations Understands the basic governing principles of duty, care and loyalty, the importance of building a diverse leadership team and deepens understanding of the essential elements of governing and leading in non-profit and union environments; and learns how to tap into personal power to exert influence from any position to promote positive change in today's challenging environment</p>	<p>Creates trusting relationships and builds consensus among leaders on governance activities and strategic objectives</p> <p>Training Considerations Increases facilitation skills to enable participants to successfully navigate difficult conversations, chair successful meetings, and learn about situational and culturally relevant leadership (emotional intelligence, cultural intelligence, cultural competency, cross-cultural networking); and utilizes current context and contemporary issues that are of greatest importance to today's leaders</p>	<p>Executes, monitors, and adjusts plans, policies, and strategies to accomplish the short- and long- term objectives of the Association</p> <p>Training Considerations Understand the levers 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</p>
Establishes and maintains collaborative and effective relationships	<p>Establishes purposeful relationships to foster collaboration</p> <p>Training Considerations Understands why relationships are essential for leadership. Learns how to establish purposeful relationships to foster collaboration. Identifies strategies to engage key stakeholders in establishing meaningful, collaborative, and sustainable relationships</p>	<p>Builds and maintains productive internal and external relationships</p> <p>Training Considerations Understands the value of building and maintaining productive internal and external relationships</p>	<p>Leverages internal and external relationships to form authentic partnerships and utilizes those partnerships to accomplish strategic objectives</p> <p>Training Considerations Learns how to leverage internal and external relationships to accomplish strategic objectives to foster positive systemic change</p>
Advances the organization by internalizing its vision, mission, and core values	<p>Uses the purpose, culture, and history of the organization, as well as education and union trends to influence the direction of work</p> <p>Training Considerations Examines the NEA's mission, vision, and core values as they relate to the organization's purpose, culture, and history by exploring key drivers that led to their adaption and modifications based on strategy, leadership, and goal setting</p>	<p>Empowers others and promotes a culture that appeals to the different motivations of members while recognizing the contributions of all</p> <p>Training Considerations Understands the local Association's mission, vision, and core values and hones their leadership skills through activities that build mobilizing and power building cultures. Engages successful strategies used to fulfill organizational commitments (e.g., mission, vision, and core values) at the local, state, and national levels; and understands how to use a mission orientation strategy to nurture the talents of a diverse membership in order to work toward a common vision</p>	<p>Implements strategies that utilize the vision, mission, and core values to drive work and culture</p> <p>Training Considerations Explores additional strategies to advance long-term organizational goals by setting and focusing on priorities at the local, state, and national levels; examines how successful implementation practices of the Association's mission, vision, and core values have resulted in positive organizational outcomes through agenda driving actions</p>

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Competency Theme	Level 1: Foundational	Level 2: Mobilizing and Power Building	Level 3: Agenda Driving
Sets strategic objectives to guide long-term goals and priorities	<p>Understands the implications of the organization's strategy and priorities as it relates to their own actions and tactics</p> <p>Training Considerations Explores how an organization's strategy impact budgeting and their individual actions and tactics. Understands organizational history as well as educational history domestically and abroad, thereby providing a foundation for current events and strategies being employed at various levels of the organization. Engages a SWOT analyses and planning techniques that make up the fundamental elements used to determine strategy; the importance of prioritization and time management for leaders at all levels; and understanding the importance of working at the strategy level versus the tactical level for leaders</p>	<p>Educates others on Association strategies and tactics to advance organizational long-term goals and priorities</p> <p>Training Considerations Educates others on Association strategies and tactics to advance organizational long-term goals and priorities. Understands how to: design, execute and communicate strategies; differentiate between strategic thinking and tactical behaviors; and utilize important leadership mental models to better understand and evaluate problems. Explores successful recruitment campaign case studies; relationship building techniques that help leaders build influence and power; and how to build a budget focused on strategy and priorities rather than line-items</p>	<p>Creates value for members by creating and communicating clear and compelling objectives to achieve long-term goals and priorities</p> <p>Training Considerations Learns how to create value for members through clear and compelling long term goals and priorities. Explores and understands how to develop organizational mission statements and effectively lead and manage organizational change by building a budget based on their mission and priorities; exploring case studies of transformational leaders and leadership; understanding the importance of generative thinking; and thinking beyond the current and obvious strategies, towards visionary leadership and culture change throughout an organization</p>
Ongoing commitment to personal and organizational culturally relevant leadership development (cultural intelligence, cultural competency, cross-cultural networking) ⁶	<p>Identifies own leadership strengths and growth opportunities and works diligently to improve them</p> <p>Training Considerations Evaluates where they are as a leader and develops a plan to grow into the leader they want to be. Explores the knowledge, skills and attributes necessary to effectively lead a diverse membership (race, ethnicity, gender, sexual orientation, religion, ability and employment/job category). Examines a variety of leadership styles and explores the various components of what it takes to become the type of leader that people want to follow</p>	<p>Identifies and builds a diverse group of leaders to take on greater roles and responsibilities in the Association</p> <p>Training Considerations Evaluates who they are as a leader and continues their path to grow into the leader they want to be. Explores what it takes to help others grow in their capacity as a leader in the Association and understands the importance of identifying, developing and partnering with individuals from diverse backgrounds. Understands the importance of relationships and relationship building techniques in helping oneself and others grow in leadership capacity; and learns ways to use formal and informal pathways to provide opportunities for leadership and assess leadership growth</p>	<p>Develops succession strategies that ensure a successful transition in leadership to sustain the Association's vision over time</p> <p>Training Considerations Evaluates who they are as a leader, get feedback from others to inform that assessment as they continue their plan to grow into the leader they want and hone skills to be able to assist others in their plan development and assessment; and understands the importance of aligning individual and organizational goals at the local, state and national levels for enhanced and sustained leadership development and organizational performance</p>

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LEADING OUR PROFESSIONS



Advocates for professional learning, professional quality and social diversity inside our professions and promotes our union's role in advancing education transformation, student learning, and equitable access to opportunities.⁷

Competency Theme	Level 1: Foundational	Level 2: Mobilizing and Power Building	Level 3: Agenda Driving
Supports professional excellence and builds capacity for continual improvement and learning to ensure the success of all students	<p>Understands the value of continuous improvement and learning for all educators across their career continuum and what this looks like in practice</p> <p>Training Considerations Gains an overview and understanding of the career continuums for ESP and teachers, with a focus on the role of professional learning and reflective practice (e.g. learning cycles) and supports in moving along each continuum and in fostering student learning and growth</p>	<p>Engages with others in meaningful development and models for continuous improvement and learning for all educators across their career continuum</p> <p>Training Considerations Understands strategies to lead others in best practices in professional learning and support, such as adult learning theory, models that are effective in professional learning, and ways to ensure that professional learning is embedded in and informed by context. Learns how to use strategies to engage others in securing high-quality professional learning opportunities and supports</p>	<p>Builds and sustains an organizational culture of professionalism and reflective practice that illustrates the professions' commitment to continuous improvement and learning for all educators across their professional continuums</p> <p>Training Considerations Utilizes system-level strategies (e.g. improvement science, labor/management collaboration) to create cultures of professionalism and reflective practice in support of student learning and growth</p>
Recognizes and promotes the Association's role in improving the learning of all students	<p>Understands the current and evolving role the Association plays in the success of all students, educators, schools and campuses</p> <p>Training Considerations Individuals develop an awareness and understanding of how the Association leverages its strengths by identifying student needs in their worksites and implementing member-led solutions to meet those needs</p>	<p>Engages all leaders and members and motivates members from diverse backgrounds to advocate for a meaningful Association role in ensuring the success of all students, educators, schools, and campuses</p> <p>Training Considerations Understands how to help and support others identify student needs in their worksites and collectively implement member- and Association-led solutions to meet those needs</p>	<p>Expands and elevates the Association's role by developing members' leadership capacity and collaborating with innovative allies to ensure the success of all students, educators, schools, and campuses</p> <p>Training Considerations Leads the process of developing and using models and strategies across systems (e.g. labor/management collaboration, partnership and community engagement) to enhance the Association's ability to drive the success of P-20 education systems</p>
Advocates for policies and strategies that positively impact our professions and the learning of all students	<p>Understands the policies and conditions that impact our professions and learning of all students using a race equity lens</p> <p>Training Considerations Individuals develop an awareness of the policies, conditions and skills necessary to impact them (e.g. power mapping decision makers, gathering allies, create narrative based on audience) in order to impact our professions and learning of all students</p>	<p>Advocates, with others, for equitable policies and conditions that positively impact our professions and the learning of all students</p> <p>Training Considerations Understands and helps others develop and implement an awareness and the skills necessary to positively impact policy and policymakers (e.g. power mapping decision makers, gathering allies, create narrative based on audience) in order to impact our professions and learning of all students</p>	<p>Builds strategies to ensure sustained, organizational support for the implementation of equitable policies that positively impact our professions and the learning of all students</p> <p>Training Considerations Leads the development and implementation of models and strategies to positively impact policy that sustain systems that impact our professions and the learning of all students</p>

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Competency Theme	Level 1: Foundational	Level 2: Mobilizing and Power Building	Level 3: Agenda Driving
<p>Analyzes and applies research to determine the potential impact on our professions and the learning of all students⁸</p>	<p>Understands how to identify high-quality qualitative and quantitative research and how research informs the programs and policies that affect our professions and the learning of all students using a race equity lens</p> <p>Training Considerations Develops an understanding of how to find, evaluate, and use high-quality research (e.g. validity, appropriateness for needs, importance, and social and cultural context) to impact our professions and the learning of all students</p>	<p>Understands how to help others utilize research to inform decision-making and the development of effective and equitable programs and policy content to strengthen our professions and the learning of all students</p> <p>Training Considerations Engages with others to understand the appropriate use of research in the development, implementation, and evaluation of education policies and programs (e.g. summarize, distill and display complex data and communicate to and with appropriate audiences, integrate relevant research into programs)</p>	<p>Leverages the resources of the organization to collaborate with internal and external stakeholders to analyze, evaluate and communicate education research to strengthen our professions and the learning of all students using a race equity lens</p> <p>Training Considerations Lead the development, implementation and evaluation of system-level strategies for communicating research to drive program development and decisions about our professions and the learning of all students (e.g. summarize, distill and display complex data and communicate to and with appropriate audiences, integrate relevant research into programs)</p>

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ORGANIZING



Mobilizes, activates and engages members and leaders to support internal and external relationships and Association capacity to: recruit, retain and identify diverse groups of members and leaders; and advance strategic priorities at the national, state and local levels.⁹

Competency Theme	Level 1: Foundational	Level 2: Mobilizing and Power Building	Level 3: Agenda Driving
Utilizes best practices, technologies, and methods that through experience and research have led to successful organizing outcomes	<p>Understands the theory and best practices associated with organizing using a racial and social justice lens</p> <p>Training Considerations Explores organizing best practices and how to utilize them, including the intentional identification of leaders, a foundational understanding of institutional racism and implicit bias (i.e. strategic readings, case studies from within NEA recent experience)</p>	<p>Develops a successful campaign using organizing skills to engage diverse groups of members on key issues and builds local union capacity</p> <p>Training Considerations Exposes participants to the best practices in joining the local membership or organizing committee to plan and help execute an organizing activity and/or field experience, including development of growth and strength goals within a campaign context. Builds on knowledge for addressing institutional racism and implicit bias within organizing strategies</p>	<p>Evaluates campaign strategies to continually improve the impact of future campaigns and organizing approaches through a race equity lens</p> <p>Training Considerations Explores the best practices in leading all or part of an organizing activity for a work site or local affiliate including the impacts on student outcomes; advancing racial and social justice by shifting the narrative about race and addressing implicit bias; and the intersectionality of multiple cultural identities</p>
Builds and maintains meaningful community partnerships	<p>Engages diverse groups of audiences in the community to identify common issues</p> <p>Training Considerations Explores how and why to build meaningful community partnerships, how to identify appropriate partners, and how to get started in this work. Examines community partnerships and various successful partnership models within the NEA. Apply strengths, weaknesses, opportunities and threats analysis (SWOT) among and between community partners with whom differences exist to ensure a more meaningful partnership or to know when to amicably exit a partnership</p>	<p>Collaborates with all community audiences, to act on shared priorities</p> <p>Training Considerations Exposes participants to advanced strategies on building community partnerships that are diverse and cognizant of impact of implicit bias and the principles of racial and social justice. Examines deeply models of successful partnership around common issues, including case studies and review of challenges (and solutions) for sustainable partnership organizing issues using a racial and social justice lens</p>	<p>Transforms the relationship within and among a diverse community to harness the power of collective action</p> <p>Training Considerations Provides strategies for effective partnership and coalition organizing around public education issues using a racial and social justice lens. Use successful models, including case studies, of advancing the mission of great public schools by building powerful coalition campaigns</p>
Makes strategic plans that rely on data and analysis to set and achieve key organizing objectives	<p>Analyzes and effectively compiles reliable research data to formulate organizing strategies through the use of appropriate tools</p> <p>Training Considerations Engages various data sources to import and export records for analysis related to growth and strength, and to the role of strategic research in organizing</p>	<p>Utilizes reliable data to formulate a foundation for long term plans including objectives, strategies and goals</p> <p>Training Considerations Explores advanced data analytics training and advanced use of strategic research and learns how periodic review of data can provide continuous improvement to planning events. Explores exporting data reports for mapping and strategic targeting; targets engagement of member populations (especially new educators and diverse members within leadership roles)</p>	<p>Implements strategic plans that grow a diverse membership and support key Association objectives</p> <p>Training Considerations Learns how to actively participate with local or state member organizing committees to set up targets for membership recruitment. Uses strategic research and data mining techniques in organizing and bargaining campaigns. Builds upon mapping and targeting audiences using a race equity lens</p>

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Competency Theme	Level 1: Foundational	Level 2: Mobilizing and Power Building	Level 3: Agenda Driving
Engages in collective action to identify and address pivotal issues	<p>Identifies and engages in high impact and actionable organizing opportunities that drive growth of a diverse membership and advances the mission of great public schools</p> <p>Training Considerations Explores case studies and examples of engagement activities in local or state affiliate. Employs methods of identifying appropriate issues for action and identifies the importance of message discipline</p>	<p>Engages others to take advantage of key organizing opportunities, using members' passions and interests, leveraging the power of partnerships, and providing pathways for engagement that impact policy or practice in public education, either locally or at a state level</p> <p>Training Considerations Seeks out state affiliate or community organizing and engagement opportunities. Learns what strategies and tactics are and leaves with a menu of campaign options and models. Explores and plans for how racial and social injustice can impact engagement throughout the organizing process</p>	<p>Makes organizing around key issues more systematic and process driven, to improve their impact</p> <p>Training Considerations Explores successful collective action campaign models, including case studies, and engages in advanced strategic discussions of structures to foster sustained collective engagement the routine use of collective voice and action to advance racial and social justice and public education</p>
Creates conditions for continuous Association growth and strength	<p>Understands processes and strategies for member recruitment, engagement and retention</p> <p>Training Considerations Participates in a worksite or affiliate back-to-school recruitment campaign or listening tour. Learns and practices the Story of Self along with campaign scripts that support successful one-to-one conversations. Understands why capacity building is continuous work in our affiliates</p>	<p>Develops imaginative recruitment and retention strategies that continues to grow the Association's diverse membership and influence others to become more actively involved in the recruitment and engagement process</p> <p>Training Considerations Writes a recruitment campaign and engagement plan, based on sharing of models/case studies and including specific goals. Includes Story of Self and a one-to-one conversation script and understands the importance of creating worksite structures (i.e., Building/Department Reps) for capacity building</p>	<p>Influences all members to own the agenda of the Association through their active participation and attitude towards collective action</p> <p>Training Considerations Examines local growth and strength plans and learns assessment techniques to inform goal-setting for future plans. Studies successful models of routine, sustainable engagement and retention; implements change that reflect a culture of growth and strength. Develops organizing plans to recruit diverse student members, faculty and staff via ongoing articulation with predominately non-white institutions</p>
Fosters the development of leaders at all levels of the organization ¹⁰	<p>Recognizes leadership in all of its forms and provides opportunities for diverse leadership to flourish</p> <p>Training Considerations Practices work site mapping skills within the building to identify colleagues who exhibit special relationships or skills. Practices and conducts one-to-one conversations with colleagues about assuming a leadership role within the Association</p>	<p>Mentors emerging leaders and encourages them to put plans in place to accelerate their level of participation</p> <p>Training Considerations Identifies and mentors new leaders about their practice and use of Association leadership and/or professional issues leadership within their worksites. Studies distributive and natural leaders' models and participates in a field experience to identify and recruit leaders, and/or develop a local plan for leadership recruitment and development. Focuses on the recruitment of leaders that have a following, leads in their practice and professions, advances racial and social justice and exhibits an understanding of implicit bias</p>	<p>Advocates for distributive and natural leadership structures and actively supports leadership succession planning</p> <p>Training Considerations Engages in intentional leadership development and supports work to ensure sustainability of racially diverse leadership structures within worksites and locals</p>

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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.¹¹

Competency Theme	Level 1: Foundational	Level 2: Mobilizing and Power Building	Level 3: Agenda Driving
Acts strategically to align the Association's work with member needs	<p>Understands how the Association's vision, mission, and core values serve as a framework to support diversity amongst its members and member programs</p> <p>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</p>	<p>Assesses the strengths, weaknesses, opportunities, and threats of the Association including the use of an equity audit tool</p> <p>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</p>	<p>Develops strategic plans to align changing member demographics and evolving member needs with an emphasis on programs that support diversity through new business models</p> <p>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</p>
Understands the interdependency of strategic planning, budget development, and business policy	<p>Utilizes the Association's strategic plan to create a strategic budget that is inclusive of funding to support member diversity and diverse programs</p> <p>Training Considerations Learns strategic budgeting basics for maintaining fiscal health</p>	<p>Promotes a culture that recognizes the importance of fiscal responsibility; ensures Association bylaws, other governing documents and policies support financial health</p> <p>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</p>	<p>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</p> <p>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</p>
Promotes stewardship and financial integrity of the organization	<p>Recognizes the fiduciary responsibility for safeguarding Association assets and demonstrates integrity in all financial transactions</p> <p>Training Considerations Understands 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</p>	<p>Adopts financial best practices that support and strengthen Association fiscal health</p> <p>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</p>	<p>Identifies Association legal and compliance requirements and ensures obligations fulfilled to maintain the reputation of the Association</p> <p>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</p>

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Supports financial health	<p>Gains basic finance and accounting knowledge and skills to assess the overall fiscal health of the Association</p> <p>Training Considerations Learns the simple and easy method for reading financial statements, audit reports, and budgets and how to spot red flags that may signal financial trouble</p>	<p>Identifies Association risk and how to effectively assess and manage risk</p> <p>Training Considerations Gains an understanding of the components of a sound investment policy, different types of investments and risk assessment to protect cash and investments</p>	<p>Identifies experts and resources with an emphasis on utilizing persons of color and women-owned businesses whenever possible to aid and support the Association with maximizing opportunities and mitigating risks</p> <p>Training Considerations Learns how the Diverse Asset Managers Initiative (DAMI) benefits the Association's pension fund, while at the same time promotes diversity among asset management firms</p>
Utilizes data and analyzes trends to inform decision making¹²	<p>Identifies sources of union, financial and educational data to assess the impact on Association sustainability and decision making</p> <p>Training Considerations Learns how to utilize your Association's membership data along with its available cash flow to organize the Association</p>	<p>Builds member support for Association strategic goals and objectives by raising awareness of trends and data which include the impact of diverse identities</p> <p>Training Considerations Explores evaluating the mission statement of the affiliate or local and how best to establish strategic goals in order to allocate resources towards programs that provide benefit and add value for the members</p>	<p>Utilizes ratios and trends to support responsible decision making and to support Association strategic plans, and strategies for membership and financial growth</p> <p>Training Considerations Introduces leaders to the long-term financial planning process; identifies the strengths, weaknesses, opportunities, and threats that the affiliate or local may be facing and how best to create new business models as a result of this assessment</p>

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