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Leadership
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# NEA LEADERSHIP COMPETENCY GUIDE

# Acknowledgements

## National Education Association

The National Education Association (NEA), the nation's largest professional employee organization, is committed to advancing the cause of public education. NEA's 3 million members work at every level of education – from pre-school to university graduate programs. NEA has affiliate organizations in every state and in more than 14,000 communities across the United States.

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# NEA Leadership Competency Guide
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# Vision, Mission, and Values

## The National Education Association

We, the members of the National Education Association of the United States, are the voice of education professionals. Our work is fundamental to the nation, and we accept the profound trust placed in us.

## Our Vision

Our vision is a great public school for every student.

## Our Mission

Our mission is to advocate for education professionals and to unite our members and the nation to fulfill the promise of public education to prepare every student to succeed in a diverse and interdependent world.

## Our Core Values

These principles guide our work and define our mission:

**Equal Opportunity.** We believe public education is the gateway to opportunity. All students have the human and civil right to a quality public education that develops their potential, independence, and character.

**A Just Society.** We believe public education is vital to building respect for the worth, dignity, and equality of every individual in our diverse society.

**Democracy.** We believe public education is the cornerstone of our republic. Public education provides individuals with the skills to be involved, informed, and engaged in our representative democracy.

**Professionalism.** We believe that the expertise and judgment of education professionals are critical to student success. We maintain the highest professional standards, and we expect the status, compensation, and respect due all professionals.

**Partnership.** We believe partnerships with parents, families, communities, and other stakeholders are essential to quality public education and student success.

**Collective Action.** We believe individuals are strengthened when they work together for the common good. As education professionals, we improve both our professional status and the quality of public education when we unite and advocate collectively.

## The Need for a Distinctive Leadership Brand

As public education continues to transform, so has the role of educators. The National Education Association (NEA) recognizes that education leaders are making some of the toughest decisions in the history of our Association and public education. The Association will continue to strategically use its resources to invest in educators by providing opportunities that increase their awareness and understanding of their responsibilities as leaders, regardless of title or role. Educators who see themselves as leaders, whether in their Association or profession, are a necessity for the health of our union and public education.

Recognizing this need and urgency, NEA engaged leaders across the Association to discuss the current and desired future state of NEA's leadership development efforts. NEA also established a leadership development advisory team, consisting of governance, members, and staff, to review member input and ideas across the NEA and to develop a common vision for what NEA leaders should know and be able to do. It is out of this work that the NEA Leadership Competency Framework was born.

Revised in 2017-18, the NEA Leadership Competency Framework describes the 'NEA leader' of the 21st century. These competencies, updated by practitioners and staff, offer a more unified and interdisciplinary approach to leadership development, with particular attention on expanding the competencies to include skills that can position educators to address systemic problems, like institutional racism. Some of the revisions explicitly reference the intersection of race, social justice, and public education. Other times, you will notice that the knowledge, skills, and abilities listed in a competency include developing the leaders' ability to apply their knowledge of these intersections to assess current, public practices and policies, as well as organizational practices, and their impact on equity. NEA believes that these conversations and skills are paramount and necessary for every educator.

In 2020, in the midst of a global health pandemic, and racial, social, and political unrest, the framework was updated by a group of members and staff to include a seventh competency: Social and Emotional Intelligence. The new domain calls attention to the social and emotional intelligence skills adults need to lead healthy and thriving lives and teach these skills to their students and colleagues, as well as ensure these practices are integrated into the culture of their workplaces and Associations.

The NEA Leadership Competency Framework is the foundation of the leadership development brand for the enterprise, positioning the NEA as a leader for the preparation of education activists and leaders. No longer are educators left to wonder what it means to be a leader.

## Purpose

The framework is based first on a belief that educators are leaders. A second belief is that educators need a unique set of leadership competencies that will assist them in multiple areas, but specifically in leading their Associations and in their careers/professions. With this framework, NEA has defined what it means to be a "NEA leader" through the development of a series of seven leadership competency domains. While NEA continues to invest in specialized leadership development opportunities for specific membership categories and roles, these leadership competencies are intended for the benefit of all current and emerging leaders, regardless of role, level, membership type, or experience. The competencies are designed to prepare NEA members to **lead relevant, thriving Associations and become world-class education leaders in their professions**. The competency domains are interconnected and present a well-rounded picture of the knowledge, skills, and abilities NEA believes equips educators to lead and create systemic change in public education.

## The Promise of Leadership

When the NEA Leadership Competency Framework was created, leadership development was viewed as being part of individual programs or as a conference or event. Leadership was also used to describe only those individuals who held an elected position in the Association. Since the initial development of the framework, those views have changed and continue to change. Leadership development is viewed not only as an organizational priority, it is becoming widely understood that it is an essential component of enhancing organizational capacity and necessary for any educator who desires to be an exceptional practitioner and lead in the Association.

As such, leadership development is not the responsibility of a singular department or program, but is something that must be understood, prioritized, and viewed similarly throughout the NEA enterprise.

Leadership development at NEA continues to evolve to have its own language, standards, following, and brand. More and more, leadership development is being defined as a journey, rather than episodic events. More importantly, the definition of leadership is expanding and changing. Leadership is no longer necessarily defined by an elected role or position, but by key characteristics, actions and behaviors used to lead within and beyond the Association and in our nation's public schools, colleges, and universities.

The catalyst for this change is a set of NEA leadership competencies that encourage and support the leadership of self, the leadership of others, and leadership of the Association.

### Leadership of Self *(Foundational)*

The value of and need for personal growth and development is important as you think of your leadership journey. Every one of us has a compelling leadership story. We have all made choices that have shaped our life's path including: how we respond to success and failure, whether or not to take on leadership roles, and our ability or inability to take risks. We all have stories and experiences that have shaped our leadership journey.

Your leadership should be grounded in your *why*. In other words, what is your purpose for leading? As you lead yourself, engaging in regular self-reflection, as well as asking for feedback, and examing your motives for leading are important habits to develop. You should engage in activities that help grow and refine your leadership acumen and abilities. In addition, you must have a willingness to act and conduct yourself and the business of the Association with integrity.

### Leadership of Others *(Mobilizing and Power Building)*

A critical part of unleashing your own leadership potential is the ability to unleash the leadership potential in others. A leader demonstrates attributes and behaviors that captures the hearts and minds of people and inspires them to follow and to lead. Leading others enables us to activate our leadership capacity. Leading others is a way to demonstrate our shared values, experiences, and *why* we do what we do.

Understanding that no one gets here alone, it is important that you develop and work to create opportunities for others to build their leadership acumen.

Leaders foster the need for respectful and collegial relationships within and outside of the NEA and mentor current and aspiring leaders as they embark and continue on their leadership journey.

### Leadership of the Organization *(Agenda Driving)*

How do we transform the present Association into one that is prepared to handle the successes and challenges we face now and in the future? What are the critical systems that must be developed? What inequitable structures do we need to address in order to realize the potential and promise of public education?

In order to address these critical questions and others, the Association requires agenda driving leaders. Their actions and those they lead are driven by the Association's mission, vision, and core values. Agenda Driving leaders create and monitor internal systems, structures and processes that enhance organizational capacity. They lead themselves and others to develop strategy and take ownership for identifying, addressing, and creating solutions to systematic and systemic problems. Agenda driving leaders understand transformational change within the organization and within the context of broader systems.

## The NEA Leadership Competency Framework Explained

The NEA Leadership Competency Framework reflects the NEA Strategic Framework and was developed through multiple leader and member engagements, interviews, focus groups, and a review of benchmark models in union, public sector and corporate environments. These competencies define for our Association what leaders should know and be able to do in seven domains: Advocacy, Communication, Governance and Leadership, Leading Our Professions, Organizing, Social and Emotional Intelligence, and Strategy and Fiscal Health. Leadership development is not a linear process. As such, it is quite possible for an educator to be Foundational in one competency and Agenda Driving in another. Likewise, members may focus on one

competency and achieve modest growth before switching to focus on another competency. The key is that members are aware of their level of competency and have a plan for strengthening their leadership, with an eye toward learning how to effectively lead others and the Association. This is the power and usefulness of this framework.

The framework has the following essential elements:

- ✪ **Seven Competency Domains:** the core skills of leaders that support career/professional practice and helps create effective Associations; each competency includes a definition that explains the overarching purpose, goal, and objectives of the domain.

- ✪ **Key Themes:** each competency includes multiple themes that convey topic areas and frames the knowledge, skills, and behaviors that further explain the topic.

- ✪ **Progressions** *(labels adapted from language shared by the AFL-CIO):* progressions convey a brief profile of the leader and their capabilities as they grow. The progressions are: Foundational (leading of self), Mobilizing and Power Building (leading others), and Agenda Driving (leadership of the organization).

- ✪ **Behaviors:** how leaders demonstrate the competency at increasing levels of proficiency.

- ✪ **Essential Program/Learning Considerations:** not intended to be exhaustive or prescriptive, but provide a suggested approach, and in some cases, examples of what could be included in a training or program to help members develop the knowledge, skills, and abilities outlined in the progression level.

## Ideas for Using the Leadership Competencies

The competencies are a vehicle to support continuous learning and are intended to be broadly applicable across the organization for individuals, locals, affiliates, and NEA. The competencies are very robust and are not meant to be completed over the course of a single event or a single year. The competencies support the notion that leadership development is a journey, not an event. The competencies serve as a

guide and a tool to show what Association leaders should know and be able to do over the course of their careers in order to lead thriving, relevant organizations and to lead in their professions. The development of leaders should be embedded into every action, campaign, conference, convening, program, project, and training.

Below are some activities that may be considered across the NEA enterprise and at all levels.

- ✪ Endorse, adopt or customize the NEA Leadership Competency Framework to create or enhance state and local leadership development systems and programs. Help bring a greater alignment of leadership development goals across the enterprise.

- ✪ Assess your leadership proficiency across competencies at many points throughout your leadership journey. NEA has developed self-assessments, which can be accessed, along with other resources, at www.nea.org/leadershipdevelopment.

- ✪ Assess your awareness of the NEA Leadership Competency Framework by enrolling in and completing one or more leadership courses available on NEA's learning management system. The courses can be accessed at https://neapartnera.learnupon.com.

- ✪ Develop a plan for your leadership development; see the Leadership Development Guide template on page 28.

- ✪ Seek out leadership opportunities within your profession that allow you to exercise the competencies.

- ✪ Identify knowledge, skills and attributes (abilities) needed for a particular leadership role or assignment. Consider questions such as:

    What is my *why* or purpose?

    What leadership strengths can I build on through the competencies?

    What leadership challenges can I address and improve by practicing the competencies?

# Where To Turn for Leadership Development Resources

www.nea.org/leadershipdevelopment

Log on and explore resources and opportunities to support your leadership journey.

## Leadership Competency Self-Assessment(s)

The NEA leadership competency self-assessments are designed to help NEA leaders identify their own areas of strength, as well as areas where they can improve. Individuals are strongly encouraged to engage the self-assessments as often as they like or need to identify the areas in which they want to grow.

## Online Learning Opportunities

These courses are designed to assist members in understanding the NEA Leadership Competency Framework and how to use the framework as a lens and tool to develop the knowledge, skills, and behaviors needed to become stronger practitioners and Association leaders.

## NEA National Leadership Summit

NEA's annual National Leadership Summit is a training experience that helps to develop activist and leaders and prepare them with the knowledge, skills, and abilities necessary to lead relevant, thriving associations and to lead in their careers/professions. The Summit is a unified, strategic, and interdisciplinary approach to leadership development that reinforces and supports key leadership competencies in seven strategic areas.

## The NEA Leadership Development Guide *(Template)*

The guide (p. 28) is intended for individuals who are curious about their leadership and are ready to start their journey towards becoming stronger Association leaders (elected and non-elected) and stronger professionals.

## Teacher Leadership Competencies

The NEA teacher leadership competencies, developed for the Teacher Leadership Institute, are a resource for identification, reflection, guidance, and inspiration for classroom practitioners. The NEA Leadership Competency Framework was used in the development of these competencies, which can be used as guideposts for professional growth.

## ESP Professional Growth Continuum *(PGC)*

Grounded in eight universal standards for professionalism, the PGC provides education support professionals (ESPs) with clear pathways for continuous professional learning and growth. The NEA Leadership Competency Framework serves as a foundation for, and aligns with, the PGC to define for ESPs the competencies they need to begin to accelerate their professional growth.

# 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.
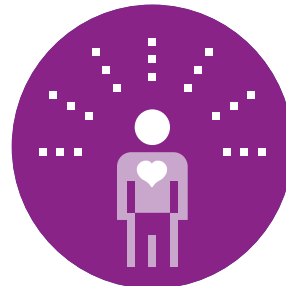
## SOCIAL EMOTIONAL INTELLIGENCE
Understands the knowledge, skills, attitudes, and behaviors that create healthy identities, manage emotions and achieve personal and collective goals; demonstrates ability to feel and show empathy, establish and maintain supportive relationships, and make responsible, caring decisions.

## STRATEGY AND FISCAL HEALTH
Builds the brand and accomplishes the goals of the Association through effective financial management and understanding of fiduciary responsibilities.

## Chart Tables Explained

# LEADING OUR PROFESSIONS

**COMPETENCY DOMAIN TITLE**

**DEFINITION**

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.
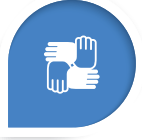
**PROGRESSIONS**

**THEME**

**PROGRAM LEARNING CONSIDERATIONS**

**BEHAVIORS**

| 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 | Understands the value of continuous improvement and learning for all educators across their career continuum and what this looks like in practice<br><br>**Learning Considerations**<br>Ga... and understanding of the career continuums f... with a focus on the role of professional le... ve practice (e.g. learning cycles) and supports in moving along each continuum a... and growth | Engages with others in meaningful development and models for continuous improvement and learning for all educators across their career continuum<br><br>**Learning Considerations**<br>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 ...sure that professional learning is embedded in and informed by ...ntext. Learns how to use strategies to engage others in securing ...h-quality professional learning opportunities and... | 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<br><br>**Learning Considerations**<br>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 |
| Recognizes and promotes the Association's role in improving the learning of all students | Understands the current and evol... the success of all students, educat...<br><br>**Learning Considerations**<br>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 | ...gages all leaders and members and motivates m... ...erse backgrounds to advocate for a meaningful Association role ...n ensuring the success of all students, educators, schools, and campuses<br><br>**Learning Considerations**<br>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 | ...d eleva... 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<br><br>**Learning Considerations**<br>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 |

# ADVOCACY

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

| Competency Theme | Level 1: Foundational | Level 2: Mobilizing and Power Building | Level 3: Agenda Driving |
|---|---|---|---|
| Utilizes best practices in advocacy and political efforts | Identifies and discusses fundamentals of advocacy practice and theory<br>**Learning Considerations**<br>Understands key concepts that prepares leader to advocate effectively for public education in a manner that garners widespread support; learns how to identify issues | Engages others in high impact activities that produce racially and socially just policies and culturally competent advocacy plans and strategies<br>**Learning Considerations**<br>Provides opportunities to engage in power mapping to help participants understand how to alter the power dynamics to win for students. When analyzing power, understands the values of recognizing a variety of leaders and groups that represent diverse communities; understands how to develop strategies and tactics that secure the support of key decision makers | Ensures best practices are integrated into plans for future endeavors and Association goals<br>**Learning Considerations**<br>Develops strategies to maximize advocacy practices and build diverse partnerships that are well integrated into strategic plans that will increase member advocacy and engagement |
| Engages and builds mutually beneficial relationships to advance advocacy and political goals | Learns issues to better understand content; shares key messages with members, the community and partners<br>**Learning Considerations**<br>Understands how to build relationships. 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 serves as a resource to assist with meeting education challenges that impact the entire school community | Works with others to create and implement advocacy plans that advance the Association's core values, supports student learning, and members' professional rights and responsibilities; identifies and sets collective goals<br>**Learning Considerations**<br>Instructs others on how to build relationships. Creates opportunities to craft and implement advocacy plans that assist participants with brokering, navigating and leveraging community partnerships/relationships that support student learning and workers' rights; provides an opportunity for developing the skill of others in learning to perform equity assessments to address policies and practices that are unjust | Organizes collaboratively with community partners around shared interests of the Association and communities<br>**Learning Considerations**<br>Empowers leaders to motivate others, build consensus, and initiate collective action; 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, colleges, and universities, and increase educator engagement and activism |
| Interprets and acts on racial and social justice initiatives | Understands the impact of education policy and practice on students and the profession using a race equity lens; increases awareness of internalized, interpersonal, and systemic racism<br>**Learning Considerations**<br>Conducts self-assessment in identifying biases. Participates in race equity trainings. 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 | Designs and analyzes advocacy plans that lead to racially equitable and socially just policies, programs, and practices<br>**Learning Considerations**<br>Helps others become aware of conscious/unconscious biases and microaggressions. 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.<br>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 | Analyzes and strengthens alliances with a diverse and inclusive set of stakeholders to implement, support, evaluate, communicate and sustain racial and social justice<br>**Learning Considerations**<br>Creates an organizational culture whereby leaders understand the value of, and know how to, lead the Association to address institutional and systemic racism at worksites, in the Association, and public education |

\* 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/All – 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 Theme | Level 1:<br>Foundational | Level 2:<br>Mobilizing and Power Building | Level 3:<br>Agenda Driving |
|---|---|---|---|
| Leads public education policy reform | Understands and reports on emerging local, state, and national public education policy and reforms<br>**Learning Considerations**<br>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 | Engages and persuades a diverse group of stakeholders to support shared interests in local, state, and national public education policy and reforms<br>**Learning Considerations**<br>Explores ways to engage and garner broad and diverse support for local, state, and national public education policy and reforms that lead legislative entities to enhance student outcomes and increases advocacy/activism | Influences and drafts local, state, and national public education policy and reforms<br>**Learning Considerations**<br>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 the profession; applies systems thinking to the Association's efforts to influence and improve policies in public education and across other sectors |
| Acts as a political advocate | Participates in advocacy and political campaign actions, including donating to political action committees, canvassing, phone banking, emailing, petition signing and other activities; encourages other members to become involved<br>**Learning Considerations**<br>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 outcomes; understands the impact of decisions on diverse groups and the larger community | 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. Develops skills to engage and understand diverse audiences<br>**Learning Considerations**<br>Trains members to help them understand local and national political situations. Learns tactics of an integrated political campaign and how member engagement/activism enhances the overall program. Challenges participants to take higher level actions. Trains others in consensus building and collective action | Takes a high level leadership role in Association, civic organization, Political Action Committee, campaign, and/or runs for office.<br>Engages the general public around critical issues for students and public education in political campaigns<br>**Learning Considerations**<br>Gains refined tools to take charge of political efforts and or run for public 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. Understands the influences of organizations and systems on behaviors |
| Makes strategic plans that are data driven and uses analysis and metrics to achieve key advocacy and political goals | Understands core data principles and the importance of using data to secure political power and advocacy wins<br>**Learning Considerations**<br>Learns what data is, why it is used to improve Association programs, and the life cycle of data. Explores importance of setting short- and long-term goals, planning, and logistical realities from a data perspective | Uses data and analytics to inform advocacy and political strategies<br>**Learning Considerations**<br>Training in goal setting and motivation; creates plans, determines metrics (transactional and transformational), and reporting. Learns concepts like theory of change and McClure's pirate metrics | Uses lessons learned, along with qualitative and quantitative data, from past campaigns to inform future initiatives<br>**Learning Considerations**<br>Aligns advocacy and political work to broader, collective values. Creates an organizational culture that understands and uses data for goal setting and planning |

# COMMUNICATION

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

| 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 | Learns the fundamentals of how to develop a focused, communications plan based on research, planning, implementation, and evaluation<br><br>**Learning Considerations**<br>Learns communication theory and its application for 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 | Develops and implements a strategic communications plan with effective messaging and vehicles for the unique needs of diverse constituencies<br><br>**Learning Considerations**<br>Learns how to build an audience-specific, message-driven, research-based, culturally and linguistically diverse, measurable communications plan that drives the Association's mission, goals, and priorities. Builds a framework for the Association's communications plan and includes examples of successful communication plan components that will resonate with diverse audiences | 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<br><br>**Learning Considerations**<br>Applies communication theory and a four-step process - research, planning, implementation, and evaluation - of communication in action. Institutionalizes ongoing communication planning and utilizes tactics that address changing needs and issues |
| Develops individual communication approach and style to fit appropriate audience | Understand the various approaches and styles needed to communicate with diverse audiences<br><br>**Learning Considerations**<br>Learns individual communication skills through assessments – such as those offered by organizations like HRDQ and the Strengths, Values, & Story Survey (SVSS) – to identify and improve the leaders' own communication style, strengths, and limitations. Learns how one's individual communications style adjusts depending on the situation and audience, the importance of inclusive approaches that appeal to all individuals, and the importance of listening to understand versus listen to respond | Tailors communications to appeal to different audiences; adjusts the purpose, substance and style<br><br>**Learning Considerations**<br>Explores how to use shared values, beliefs, and opinions to further resonate with an audience through communication. Learns how to train others to modify their communications style to appeal to multiple audiences, while staying on Association messages. Develop communication approaches that are effective in addressing racial and social issues | Develops skills to address hostile audiences, defeat challengers, and influence constituents and partners<br><br>**Learning Considerations**<br>Engages in advanced practice to master multiple communication styles for a variety of settings/environments. Uses real-world situations or examples, to prepare and rehearse for a difficult audience. Learns the important role of interpersonal communications in leadership |
| Acts as an effective speaker | Demonstrates effective public speaking and presentation skills for a variety of audiences<br><br>**Learning Considerations**<br>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; uses clear and concise language; uses nonviolent communication when addressing critical issues | Delivers engaging and persuasive speeches, presentations, and media interviews that motivates audiences to take action<br><br>**Learning Considerations**<br>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 practice what they have learned | Acts as a powerful and passionate speaker who can influence agendas and systemic change<br><br>**Learning Considerations**<br>Engages in advanced practice to master multiple communication styles for a variety of settings/environments. Provides additional critique and learning opportunities from leaders' own examples of speeches or media interviews they have conducted |

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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 Theme | Level 1: Foundational | Level 2: Mobilizing and Power Building | Level 3: Agenda Driving |
|---|---|---|---|
| Effectively uses current media *(print, broadcast, online, social media)* to communicate | Understands the communications value of current media such as print, broadcast, online and social media<br><br>Learning Considerations<br>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 to target audiences | Develops and implements strategic and integrated engagement plans that utilizes a variety of media, technology, and social networks<br><br>Learning Considerations<br>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. Learns how to finalize and implement an integrated communications plan to advance the Association's goals and priorities | Evaluates and adjusts communications plans for maximum effectiveness<br><br>Learning Considerations<br>Engages the tools and practice of how to best measure and evaluate the success of various forms of media 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 |
| Identifies and utilizes appropriate messages in acting as a compelling advocate for the organization | Understands appropriate messages and identifies messengers<br><br>Learning Considerations<br>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 | Empowers change, fortifies networks and builds coalitions by forging emotional connections with audiences<br><br>Learning Considerations<br>Explore how to develop and apply common beliefs, values, and the mission and centers race and class in the Association's messaging to and with coalition partners. Emphasis is placed on the importance of identifying, developing and partnering with individuals/organizations from diverse backgrounds and experiences | Utilizes a variety of messages and message delivery systems to successfully impact change and advocate on behalf of constituents and organization<br><br>Learning Considerations<br>Learns message-based strategies that not only build coalitions, but also unite sometimes disparate audiences around the Association's key mission, vision, and goals |

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# GOVERNANCE AND LEADERSHIP

Provides strategic leadership to advance the mission and establishes and monitors strategies necessary for a relevant and thriving Association while motivating and fostering a pipeline of diverse leaders.*

| Competency Theme | Level 1: Foundational | Level 2: Mobilizing and Power Building | Level 3: Agenda Driving |
|---|---|---|---|
| **Effectively executes governance and leadership responsibilities** | Understands the roles and responsibilities of various Association leadership positions as well as the specific duties and legal obligations of governance. Recognizes that individual values have impact on focus in Association work<br><br>**Learning Considerations**<br>Understands the basic principles of duty, care, and loyalty; understands the essential elements of governing and leading in non-profit and union environments; learns how to tap into personal power to exert influence from any position to promote positive change, even in challenging environments. Understands and can articulate individual values | Creates trusting relationships and builds consensus among leaders on governance activities and strategic objectives. Practices responsible decision-making<br><br>**Learning Considerations**<br>Understands the importance of and builds a diverse leadership team; increases facilitation skills to engage and teach others how 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); utilizes current context and contemporary issues that are of greatest important to leaders. Learns to employ and communicate decision-making processes | Understands role and responsibilities in creating and acting on the strategic vision of the Association to achieve objectives and goals<br><br>**Learning Considerations**<br>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. Strategic plan reflects the values in the Association objectives |
| **Establishes and maintains collaborative and effective relationships** | Understands the value of relationships and how to create connections with others. Develops a growth mindset, especially relating to cultural competence<br><br>**Learning Considerations**<br>Understands why relationships are essential for leadership. Learns how to establish purposeful relationships to foster collaboration. Understands the importance of discovering what matters to members. Engages in ongoing cultural competency training | Builds and maintains productive internal and external relationships. Recognizes that the value of the individual contributes to a stronger collective. Works to expand internalization of cultural competence<br><br>**Learning Considerations**<br>Engages in relationship-building techniques that help leaders build influence and power. Recognizes the impact microaggressions can have on relationships. Understands the values of building and maintaining productive internal and external relationships. Identifies strategies to engage key stakeholders in establishing meaningful, collaborative, and sustainable relationships | Leverages internal and external relationships to form authentic partnerships and utilizes those partnerships to accomplish strategic objectives. Actively works to create opportunities that empower leaders at all levels of the Association<br><br>**Learning Considerations**<br>Learns how to leverage internal and external relationships to accomplish strategic objectives to foster positive systemic change |
| **Advances the organization by internalizing its mission, vision, and core values** | Uses the purpose, culture, and history of the organization, as well as education and union trends to influence the direction of work<br><br>**Learning Considerations**<br>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 adaptation and modifications based on strategy, leadership, and goal setting. Develops an understanding of the three frames of unionism | Engages others and promotes a culture that appeals to the different motivations of members while recognizing the contributions of all<br><br>**Learning Considerations**<br>Understands the motivations of individual members that lead them to identify with the mission, vision, and values of the Association. Engages in successful strategies to fulfill the organization's purpose at the local, state, and national levels. Understands how to use a mission orientation strategy to harness the leadership skills of diverse membership in order to work toward a common vision | Implements strategies that utilize the mission, vision, and core values to drive work and culture. Engages in systemic change to address historical inequities, systems of oppression, and institutional disparities<br><br>**Learning Considerations**<br>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 |

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| Competency Theme | Level 1:<br>Foundational | Level 2:<br>Mobilizing and Power Building | Level 3:<br>Agenda Driving |
|---|---|---|---|
| Sets strategic objectives to guide long-term goals and priorities | Understands the organization's strategic plan and priorities<br>**Learning Considerations**<br>Explores how an organization's strategy impacts budgeting. Understands the Association's history, as well as the history of education, domestically and abroad to provide a foundation for understanding current events and strategies being used at various levels of the Association. Engages in SWOT (strengths, weaknesses, opportunities, and threats) analyses and planning techniques to determine strategy. Practices prioritizing and time management. Understands the difference between working at the strategy level versus the tactical level | Educates others on Association strategies and tactics to advance organization's short-term and long-term goals and priorities<br>**Learning Considerations**<br>Understands how to design, execute and communicate strategies, differentiate between strategic thinking and tactical behaviors, and expand mental model to better understand and evaluate problems. Understands how to build a budget focused on strategy and priorities rather than line-items | Increases the value of the Association for members by creating and communicating a compelling strategy to achieve long-term goals and priorities<br>**Learning Considerations**<br>Explores and understands how to develop organizational mission statements and effectively lead and manage organizational change by building a budget based on the mission and priorities; explores case studies of transformational leaders and leadership. Understands the importance of generative thinking and seeing beyond the current and obvious strategies towards visionary leadership and culture change throughout an organization |
| Ongoing commitment to personal and organizational culturally relevant leadership development (cultural intelligence, cultural competency, cross-cultural networking)* | Identifies own leadership strengths and growth opportunities and works diligently to improve them. Possesses self-efficacy and knows how to use oneself as an instrument in change<br>**Learning Considerations**<br>Understands the domains in the NEA Leadership Competency Framework. Evaluates where they are as a leader and develops a plan to grow into the leader they want to become. Explores the knowledge, skills, attitudes, and behaviors 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 | Identifies and builds a diverse group of leaders to take on greater roles and responsibilities in the Association<br>**Learning Considerations**<br>Helps other leaders develop an awareness of the NEA Leadership Competency Framework. 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 in their careers/professions. 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; learns ways to use formal and informal pathways to provide opportunities for leadership and assess leadership growth | Develops succession strategies that ensure a successful transition in leadership to sustain the Association's vision over time<br>**Learning Considerations**<br>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. Addresses and removes barriers to leadership and creates formal pathways in the Association to provide development opportunities for a diverse group of leader. Ensures that the NEA Leadership Competency Framework has been formally adopted and integrated into the Association's culture, strategy, and programs |

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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.*

| 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 | Understands the value of continuous improvement and learning for all educators across their career continuum and what this looks like in practice<br><br>**Learning Considerations**<br>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 | Engages with others in meaningful development and models continuous improvement and learning for all educators across their career continuum<br><br>**Learning Considerations**<br>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 | 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 career continuums<br><br>**Learning Considerations**<br>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 |
| Recognizes and promotes the Association's role in improving the learning of all students | Understands the current and evolving role the Association plays in the success of all students, educators, schools, and campuses<br><br>**Learning Considerations**<br>Individuals develop an awareness and understanding of how the Association leverages its strengths by identifying student needs at educators' worksites and implementing member-led solutions to meet those needs | Engages leaders and members and motivates members from diverse backgrounds to advocate for a meaningful Association role at ensuring the success of all students, educators, schools, and campuses<br><br>**Learning Considerations**<br>Understands how to help and support others identify student needs at their worksites and collectively implement member- and Association-led solutions to meet those needs | 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<br><br>**Learning Considerations**<br>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 |
| Advocates for policies and strategies that positively impact our professions and the learning of all students | Understands the policies and conditions that impact our professions and learning of all students using a race equity lens<br><br>**Learning Considerations**<br>Individuals develop an awareness of the policies and conditions that impact the learning of all students in the P-20 education system. Develop an awareness of the skills necessary (e.g., understands how policy is created, how to power map decision makers, organizing allies, creating narratives based on audience) to have an impact on the professions and learning of all students | Advocates, with others, for equitable policies and conditions that positively impact our professions and the learning of all students<br><br>**Learning Considerations**<br>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, organizing allies, creating narratives based on audience) in order to impact our professions and the learning of all students. Explores ways to engage and garner broad and the diverse support for local, state, and national public education policy and reforms. Helps others learn how to apply a race equity lens to policy reform that enhances student outcomes, build stronger schools, colleges, and universities | Builds strategies to ensure sustained, organizational support for the implementation of equitable policies that positively impact our professions and the learning of all students<br><br>**Learning Considerations**<br>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 |

| Competency Theme | Level 1: Foundational | Level 2: Mobilizing and Power Building | Level 3: Agenda Driving |
|---|---|---|---|
| Analyzes and applies research to determine the potential impact on our professions and the learning of all students* | 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<br><br>**Learning Considerations**<br>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 | 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<br><br>**Learning Considerations**<br>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) | 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<br><br>**Learning Considerations**<br>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) |

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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.*

| 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 | Understands the theory and best practices associated with organizing using a racial and social justice lens<br><br>**Learning Considerations**<br>Explores organizing best practices and how to utilize them, including the intentional identification of leaders, and develops a foundational understanding of institutional racism and implicit bias (i.e. strategic readings, case studies from within NEA recent experience) | Develops a successful campaign using organizing skills to engage diverse groups of members on key issues and builds union capacity<br><br>**Learning Considerations**<br>Exposes participants to best practices in joining the union's 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; explores successful recruitment campaign case studies. Utilizes organizing strategies to build on knowledge for addressing institutional racism and implicit bias within organizing strategies | Evaluates campaign strategies to continually improve the impact of future campaigns and organizing approaches using a race equity lens<br><br>**Learning Considerations**<br>Explores the best practices in leading all or part of an organizing activity for a worksite or 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 |
| Builds and maintains meaningful community partnerships | Engages diverse groups of audiences in the community to identify common issues<br><br>**Learning Considerations**<br>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 | Collaborates with all community audiences to act on shared priorities<br><br>**Learning Considerations**<br>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. Deeply examines models of successful partnership around common issues, including case studies and review of challenges (and solutions) for sustainable partnership on organizing issues using a racial and social justice lens | Transforms the relationship within and among a diverse community to harness the power of collective action<br><br>**Learning Considerations**<br>Provides strategies for effective partnerships and coalition organizing around public education issues using a racial and social justice lens. Uses successful models, including case studies, of advancing the mission of great public schools by building powerful coalition campaigns |
| Makes strategic plans that rely on data and analysis to set and achieve key organizing objectives | Analyzes and effectively compiles reliable research data to formulate organizing strategies through the use of appropriate tools<br><br>**Learning Considerations**<br>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 | Utilizes reliable data to formulate a foundation for long-term plans including objectives, strategies and goals<br><br>**Learning Considerations**<br>Explores advanced data analytics training and advanced use of strategic research and learns how periodic review of data can provide continuous improvement for organizing campaigns and events. Explores exporting data reports for mapping and strategic targeting; targets engagement of member populations (especially new educators and diverse members for leadership roles) | Implements strategic plans that grow a diverse membership and support key Association objectives<br><br>**Learning Considerations**<br>Builds an organizational culture that supports continuous organizing. 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 |

| 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 | 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<br><br>**Learning Considerations**<br>Explores case studies and examples of engagement activities in the local or state affiliate. Employs methods of identifying appropriate issues for action and identifies the importance of message discipline | 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<br><br>**Learning Considerations**<br>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. Organizes others to engage in collective action and measure efforts using transactional and transformational metrics. Explores and plans for how racial and social injustice can impact engagement throughout the organizing process | Makes organizing around key issues more systematic and process driven to improve impact<br><br>**Learning Considerations**<br>Explores successful collective action campaign models, including case studies, and engages in advanced strategic discussions of structures to foster sustained collective engagement and the routine use of collective voice and action to achieve organizing goals and advance racial and social justice in public education |
| Creates conditions for continuous Association growth and strength | Understands processes and strategies for member recruitment, engagement and retention<br><br>**Learning Considerations**<br>Participates in a worksite or affiliate 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 | 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<br><br>**Learning Considerations**<br>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. Creates and promotes a team culture that encourages the growth of individual members and the Association | Influences all members to own the agenda of the Association through their active participation and attitude towards collective action<br><br>**Learning Considerations**<br>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 reflects a culture of growth and strength. Develops organizing plans that are intentional about recruiting diverse membership categories, including public sector workers, as well as Aspiring Educators, faculty and staff at predominantly non-white institutions; work to include articulation agreements with non-white institutions |
| Fosters the development of leaders at all levels of the organization* | Recognizes leadership in all of its forms and provides opportunities for diverse leadership to flourish<br><br>**Learning Considerations**<br>Understands and practices relationship building techniques that helps build influence and power; practices work site mapping skills 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. Engages in perspective-taking | Mentors emerging leaders and encourages them to put plans in place to accelerate their level of participation<br><br>**Learning Considerations**<br>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 leadership 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 | Advocates for distributive and natural leadership structures and actively supports leadership succession planning<br><br>**Learning Considerations**<br>Develops and measures Association's leadership development strategy. Engages in intentional leadership development and supports work to ensure sustainability of racially diverse leadership structures within worksites and locals |

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# SOCIAL AND EMOTIONAL INTELLIGENCE

Understands the knowledge, skills, attitudes, and behaviors that create healthy identities, manage emotions, and achieve personal and collective goals; demonstrates ability to feel and show empathy, establish and maintain supportive relationships, and make responsible, caring decisions.*

| Competency Theme | Level 1: Foundational | Level 2: Mobilizing and Power Building | Level 3: Agenda Driving |
|---|---|---|---|
| Understands one's emotions, thoughts and values and how they influence behavior across contexts | Understands and can articulate one's purpose; recognizes one's strengths and areas of growth with a well-grounded sense of confidence and purpose. Being aware of what you can tolerate in your/the current reality and being aspirational of what is still possible<br><br>**Learning Considerations**<br>Engages in self-reflection, self-assessment, and improvement. Understands own emotions. Identifies personal, cultural, and linguistic assets. Learns how to develop a purpose (why) statement. Understands the intersection of personal and social identities of self and others. Examines and addresses prejudices and biases. Understands identity within context of a foundational level understanding of race, racism, and the intentional development of racialized institutions and systems. Articulate personal role in contributing to transformative change. Engages in contemplative practices. Develops a growth mindset. Identifies and evaluates their values and beliefs as a leader. Develops a healthy sense of self to strengthen agency, vulnerability, and relationships | Leads others to develop self-awareness. Creates space and opportunities for others to identify their own emotions, recognize their assets and contributions, reflect on their experiences and identities; examines conscious and unconscious biases; cultivate growth mindset<br><br>**Learning Considerations**<br>Educates others in practices to discover their purpose. Equips others on how to identify values. Understands the relationship between feelings and reactions to people and situations. Learn how to give and receive feedback to promote self-awareness. Educates others on developing a growth mindset. Understands identity within the context of race, racism and the intentional development of racialized institutions and systems; can facilitate conversations and train others. Leads others in discovering conscious and unconscious biases. Understands knowledge from research and experience regarding advocacy and movement building as avenues for purpose and self-efficacy | Uses self-awareness and discernment to develop organizational awareness to guide the Association in developing healthy organizational (Association and/or workplaces) cultures and lead continuous improvement. Leads reframing the understanding of a situation/ assumption/mindsets<br><br>**Learning Considerations**<br>Learns the power of awareness of personal and social identities and their impact on the organization and its members. Encourages the organization to apply a race equity lens in all aspects of the organization. Leads the organization in assessing and improving culture, including normalizing the practice of self-awareness and a growth mindset. Assesses the organization's readiness for change, and identifies levers to enhance organizational effectiveness. Uses data in decision-making. Aligns the organization's work with core values. Helps members develop a toolkit of protocols, practices, procedures, etc., to improve self-awareness |
| Manage one's emotions, thoughts, and behaviors effectively in different situations and to achieve goals and aspirations | Understands how to regulate one's emotions, deconstruct patterns of thinking, identify, and use self-care and stress and trauma management strategies, as well as demonstrate personal agency and the ability to exhibit self-discipline, self-motivation, and the courage to take initiative and have voice and seat at the table. Demonstrates an ability to prioritize and juggle multiple demands without losing focus or energy<br><br>**Learning Considerations**<br>Understands and practices vulnerability as a core competency of leadership. Learns practices of self-management including coping and resilience skills, stress and trauma management, and seeks opportunities for healing. Explores how to develop personal goals. Learns the history of racism, engages in anti-racism training and equity assessments | Equips members and students in managing emotions and developing coping skills; demonstrates how to express emotions with others as appropriate to the situation. Assists others in discovering their personal agency as well as the collective agency of groups. Assists members in developing motivation to accomplish personal and professional goals. Instructs members on how to develop and use planning and organizational skills. Helps others manage their stress, trauma, and seek opportunities for healing<br><br>**Learning Considerations**<br>Learns how to engage in critical conversations. Understands how to lead others in regulation and expressing emotions. Understands and helps others set goals and the role of motivation and resilience in achieving goals and dealing with setbacks. Cultivates others' abilities, develop habits, and practices of self-care, including the of use contemplative practices (meditation, journaling, etc.) to identify and manage emotions, as well as training to develop trauma-informed practices and healing | Understands and uses influence to affect Association behavior and achieve Association goals. Unites others in collective goals and a shared sense of efficacy<br><br>**Learning Considerations**<br>Explores how to lead the Association in understanding and appreciating the value of collective agency in shaping the Association's culture and effectiveness. Understands the importance of aligning individual and Association values to increase motivation and commitment. Understands how to align individual goals to create collective goals and actions. Understands and encourages collective action with assessment and reflection |

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| Competency Theme | Level 1: Foundational | Level 2: Mobilizing and Power Building | Level 3: Agenda Driving |
|---|---|---|---|
| Understand the perspectives of and empathize with others, including those from diverse backgrounds, cultures, and contexts | Engages in perspective-taking; practices empathy, compassion, respect, and vulnerability when expressing one's own lived experiences and in seeking to understand others. Understands historical and social norms of behaviors in different settings and actively disrupts social norms that prevent equitable agency; recognizes and values that family, school/campuses/workplaces, and community are resources and supports, without applying a value judgment<br><br>**Learning Considerations**<br>Seeks out information about the historical and social construction of racism and other areas of marginalization/systemic oppression (racialized society). Individuals develop the ability to engage in polarity management mapping and thinking (i.e., exploring "both-and" thinking). Understands the power of storytelling to create safe, diverse, and inclusive spaces. Understands and recognizes their psychological and emotional response to micro-aggressions and other identity-related issues | Advocates with others to create safe, diverse, and inclusive spaces for educators and students to share their stories and be understood; and leads conversations to teach empathy, foster understanding, and learn about historical inequities and institutional disparities, while being intentionally aware of power dynamics and how they impact and prevent paths to leadership and engagement. Demonstrates an appreciation of the values, talent, and potential capacity of others and promotes collective agency. Helps members manage triggers so they can stay engaged in the work<br><br>**Learning Considerations**<br>Supports others to develop social awareness. Learns how to engage in dialogue and practice advocacy and inquiry in conversations to better understand the viewpoints of others. Engages in deep analysis of racism and oppression to better understand how one's experiences fit into the larger context and one's role in disrupting systemic racism. Engages in collaborative, consistent and open conversations with stakeholders. Learns to build coalitions that considers families and communities as partners, promotes shared power and collective action; explores the historical and social norms of students, families, and communities. Uses storytelling to connect with others and deepen understanding | Understands the influences of organizations and systems on social behaviors. Leads a review of the organization's practices to address institutional disparities and leverages the organization to address historical inequities and create systemic change. Expands the organization's role as a socially responsible partner<br><br>**Learning Considerations**<br>Leads the organization in becoming a learning organization and developing the skills for systems thinking. Understands and uses the skills and tools to facilitate transformative change. Recognizes and anticipates change and understands how change spurs leadership growth and makes the organization stronger. Helps the Association understand its role of being socially responsible and its impact on the larger system. Builds alliances and coalitions that are diverse, inclusive, promotes shared power, especially with underserved and marginalized communities |

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| Competency Theme | Level 1: Foundational | Level 2: Mobilizing and Power Building | Level 3: Agenda Driving |
|---|---|---|---|
| Establishes and maintains healthy and supportive relationships and effectively navigates settings with diverse individuals and groups | Understands how to build relationships by focusing on trust, using clear and honest (nonviolent) communication, engaging in active listening, and encouraging cooperation and collaboration to problem solve and negotiate conflict constructively. Understands the need to have agency, resist negative social pressure, remain congruent with values while building relationships, and uses personal power to influence healthy relationships. Values and practices transparency<br><br>**Learning Considerations**<br>Engages in training to deepen self-awareness, self-management, and social awareness. Practices nonviolent communication and strategies for getting to 'yes'. Learns effective interpersonal communication skills to increase empathy, including the art of engaging in conversation, practicing deep listening, assessing your written communication, as well as your non-verbal communication, like body language. Engages in ongoing cultural and linguistic competency training to deepen awareness and appreciation for different cultures (i.e., understanding norms and social roles, and related rules about accepted emotional displays) and increase cultural and linguistic fluency (i.e., code switching). Applies principles of one-to-one organizing conversations to build relationships. Engages in role play to understand how to resist negative social pressure. Recognizes the need to build relationships and understands connections across race, culture, age, and distance | Creates and promotes a team culture that encourages vulnerability, invites diverse opinions, straight talk, commitment, accountability, and trust, and encourages a distributive leadership model that views all team members as leaders and understands how to manage conflict; encourages the growth of team members to collaborate toward a shared vision<br><br>**Learning Considerations**<br>Understands and attends to group dynamics (i.e., norms, group thinking, sub-group formation, triangulation, etc.) and the stages of group development, including understanding power, conflict, and decision-making; understanding the importance of developing a vision for the team. Uses facilitation skills to achieve consensus building. Practices giving and receiving feedback and engaging in one-to-one conversations. Creates training that involves experiential learning and scenarios that strengthen the team's effectiveness and ability to solve complex problems. Helps others become culturally and linguistically literate. Learns to advance the talents of others in ways that support their growth goals. Helps leaders develop social and emotional intelligence. Advocates for the rights of others. Demonstrates a willingness to continue to learn about the impact and role of racism on interpersonal and group relationships. Trains others on how to coach and mentor leaders. Engages others in normalizing conflict and addressing conflict constructively | Develops a strategic plan and budget that includes a strategy and resources for leadership and team development; promotes a culture of risk-taking, interdependency and support and help when needed and rewards collaboration. Relationship-building and strong communication skills are a part of the culture of the Association<br><br>**Learning Considerations**<br>Takes a high-level role in influencing the Association's culture; promotes collaboration within the organization and with external stakeholders. Encourages collective action. Understands how to manage transitions between leadership within organizations and its impact on the organization. Leaders serve as models and actively engages in creating a leadership development strategy for the organization that includes ongoing identification, coaching, mentoring of leaders and leadership programs that are race-inclusive; assesses the organization's structures to remove barriers to access for leaders, particularly underrepresented communities |
| Makes caring and constructive choices about personal behavior and social interactions across diverse situations | Demonstrates curiosity and open-mindedness. Applies a combination of lived experiences and decision-making tools and strategies that analyze situations to develop solutions, and evaluates the benefits and consequences of various actions for personal, social and collective well-being. Takes ownership of decisions. Questions assumptions and willing to learn and unlearn to discover new ideas and possibilities<br><br>**Learning Considerations**<br>Develops the skill to apply systems thinking to better understand and work to solve complex problems. Understands theory and frameworks about decision-making (i.e., level of decision-making) and Levels of Perspective. Applies an equity lens to decision-making. Applies an Appreciative Inquiry model when problem-solving and assesses the impacts of decisions for self and others. Learns about the ongoing individual and institutional impacts of systemic racism. Learns how to identify and address inequities and injustice | Educates and coaches others on how to behave ethically and responsibly and create solutions to address personal and social challenges and develop skills to engage and understand diverse audiences; helps others expand anti-racist practices and engage in healing work to find mental balance in a safe environment; demonstrates ability to explain reasoning and motivation behind decisions and actions that impact others<br><br>**Learning Considerations**<br>Understands the Association's core values and ensures alignment in decision-making. Explores the role of the Association in promoting personal, family and community well-being. Understands and addresses power dynamics in decision-making and teaches critical thinking skills that are useful for personal and professional growth; evaluates decisions for impact. Educates others on how to develop solutions for personal and social problems. Trains others on developing their awareness and use of decision-making theories and tools. Develop one's and others' ability to examine beliefs and assumptions and to learn about the ongoing individual and institutional impacts of systemic racism. Develops the abilities of others to identify and address inequities and injustice | Recognizes the Association's role in promoting personal and collective well-being as well as anticipate and respond to change responsibly<br><br>**Learning Considerations**<br>Leaders surface and address complexity, including across systems, across domains of development. Ensures decision-making processes are understood and accessible to the organization. Ensures the organization's strategic plan is aligned with advancing the vision, mission and core values and guides affiliates through the process of using responsible decision-making to focus on priorities and advance long-term goals. Understands the role of qualitative and quantitative data in decision-making. Analyzes organization's decisions to measure the impact on communities, institutions, and systems. Understands the levels of influence and how to use influence to organizational change and create systemic change. Association leads on addressing equity and institutional and systemic racism, takes an active role in dismantling white supremacy culture within the Association and the broader community, while providing opportunities for members to learn skills to play an active role in creating a more just society |

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# NEA LEADERSHIP COMPETENCY FRAMEWORK

**LEVEL 1: FOUNDATIONAL (LEADING OF SELF)**

**LEVEL 2: MOBILIZING AND POWER-BUILDING (LEADING OTHERS)**

**LEVEL 3: AGENDA-DRIVING (LEADING THE ORGANIZATION)**

## Strategy and Fiscal Health
Builds the brand and accomplishes the goals of the association through effective financial management and understanding of fiduciary responsibilities.

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

## Organizing
Mobilizes to influence successful organizing outcomes, strengthen internal and external relationships, and membership capacity; as well as recruit and identify new members and potential leaders into the association.

## Social Emotional Intelligence
Understands the knowledge, skills, attitudes, and behaviors that create healthy identities, manage emotions and achieve personal and collective goals; demonstrates ability to feel and show empathy, establish and maintain supportive relationships, and make responsible, caring decisions.

## Communication
Builds an integrated communications strategy that drives the goals of our professions.

## Leading Our Professions
Advocates for quality inside our professions and promotes our union's role in advancing education transformation and student learning.

## 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.

# 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.*

| 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** | Understands how the Association's mission, vision, and core values serve as a framework for Association programs and to support a diverse membership<br><br>**Learning Considerations**<br>Learns to formulate the beginnings of a strategic plan by assessing the Association's mission, vision, and core values. 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 | Assesses the strengths, weaknesses, opportunities, and threats (SWOT) of the Association including the use of an equity audit tool; engages in perspective-taking and envisions different possibilities<br><br>**Learning Considerations**<br>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 | Develops strategic plans to align with changing member demographics and evolving member needs with an emphasis on programs that support diversity through new business models<br><br>**Learning Considerations**<br>Learns how to use the Association's mission, vision, 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 |
| **Understands the interdependency of strategic planning, budget development, and business policy** | Utilizes the Association's strategic plan to create a budget that is inclusive of funding to support member diversity and diverse programs<br><br>**Learning Considerations**<br>Learns strategic budgeting basics for maintaining fiscal health and learns to apply a race equity lens in the construction of the budget and programs | Promotes a culture that recognizes the importance of fiscal responsibility; ensures Association bylaws and other governing documents and policies support financial health. Demonstrates responsibility through transparent decision making.<br><br>**Learning Considerations**<br>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 of the Association | Evaluates the effectiveness of strategic plans using outcome based goals and metrics (transactional and transformational), actual to budget financial results, and the effectiveness of Association policies to ensure long-term sustainability of the Association<br><br>**Learning Considerations**<br>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. |
| **Promotes stewardship and financial integrity of the organization** | Recognizes the fiduciary responsibility for safeguarding Association assets and demonstrates integrity in all financial transactions<br><br>**Learning Considerations**<br>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 | Adopts financial best practices that support and strengthen Association fiscal health<br><br>**Learning Considerations**<br>Learns how to implement basic internal controls, as well as policies and procedures that reduce the chances of fraud in the Association. Uses tools, such as a monthly bank reconciliation workbook as a part of implementing internal control systems | Identifies Association legal and compliance requirements and ensures obligations fulfilled to maintain the reputation of the Association<br><br>**Learning Considerations**<br>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 brand and reputation remains protected |

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| | | | |
|---|---|---|---|
| **Supports financial health** | Gains basic finance and accounting knowledge and skills to assess the overall fiscal health of the Association<br><br>Learning Considerations<br>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 | Identifies Association risk and how to effectively assess and manage risk. Engages in financial planning<br><br>Learning Considerations<br>Gains an understanding of the components of a sound investment policy, different types of investments, and risk assessment to protect cash and investments | Engages in responsible decision-making in leading the Association in maximizing opportunities and mitigating risks, including dedicating resources to identify and utilize persons of color and women-owned businesses who are experts in risk mitigation and can support the Association<br><br>Learning Considerations<br>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 |
| **Utilizes data and analyzes trends to inform decision-making***  | Identifies sources of union, financial and educational data to assess the impact on Association sustainability and decision-making<br><br>Learning Considerations<br>Learns how to utilize your Association's membership data along with its available cash flow to understand the Association's financial position | Builds member support for Association strategic goals and objectives by raising awareness of trends and data, which include the impact on diverse identities<br><br>Learning Considerations<br>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 members | Utilizes ratios and trends to support responsible decision-making and to support Association strategic plans, including strategies for membership and financial growth. Accurately analyzes disparate data and information to identify root causes of problems<br><br>Learning Considerations<br>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 |

# NEA Leadership Development Guide

This guide is intended for members who are curious about their leadership and ready to start their journey toward becoming stronger Association activists and leaders (elected and non-elected) and stronger professionals.

## MEMBER INFORMATION

Name: _____    Email: _____

State Affiliate: _____    Local Affiliate: _____

Contact Number: _____    Date: _____

## Step 1: Develop an Understanding of the NEA Leadership Competency Framework

Read the NEA Leadership Competency Framework guide in its entirety. We have also developed asynchronous courses to assist in deepening your understanding of the framework. The courses can be accessed via NEA's learning management system: **www.nea.org/pep**.

*Goal: Develop an awareness of each competency and how each can support you in your growth.*

**Demonstrate Your Awareness**

Document how you believe the competency framework can assist you and others.

_____

_____

_____

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# Step 2: Self-Assessment

It is through a deep understanding of yourself as a leader, using the competency framework as a guide, that you will become aware of the knowledge, skills, and abilities you have and those that need developing. After reviewing the framework, educators are encouraged to complete the leadership competency self-assessments at https://www.nea.org/pep and record their scores to use as a baseline for measuring growth over time.

*Goal: Assess your leadership and begin to identify growth goals.*

Note: It is recommended that educators view the corresponding module for each self-assessment.

## Self-Assessment Scorecard
Record each competency and overall score.

| Competency | Current Self-Assessment Score/Date | 2nd Self-Assessment Score/Date | 3rd Self-Assessment Score/Date |
|---|---|---|---|
| Advocacy | | | |
| Communication | | | |
| Governance and Leadership | | | |
| Leading Our Professions | | | |
| Organizing | | | |
| Social and Emotional Intelligence | | | |
| Strategy and Fiscal Health | | | |

# Step 3: Identifying Leadership Goals

After the self-assessment, reflect on why, how, and where you aspire to lead, select a competency(ies) on which to focus.

*Goal: To establish an articulated focus that is grounded in the competencies and outlines the knowledge, skills, and abilities you want to strengthen.*

Consider the following guiding questions as you begin to articulate your leadership development focus.

What competencies will you target for development?
Why is this area of growth (competency) meaningful?
Where do you fall along the progression continuum? To what level do you aspire to grow?
How does the identified area of growth align with your personal goals?
How will you use the skills to lead others and the organization?
How will your growth impact the needs of students, colleagues, your school/district, worksite or campus, and your community?

## Articulate Your Focus

After contemplation of the above questions, articulate your leadership development growth focus using the grid below.

| Identify the competency(ies). | Choose competency theme(s). | Identify your current progression level for each theme. | Use the progression levels to identify the behaviors you aspire to develop. |
|---|---|---|---|
| | | | |
| | | | |
| | | | |

# Step 4: Working Toward Your Goal

Identify and keep track of how you plan to develop the knowledge, skills, and abilities to reach your goal(s); be specific and include dates for each activity and date of anticipated completion. Your action plan will not only clarify the growth you are making, it will also help you articulate your learning to others. Be specific when developing your action plan. For example, if you want to learn how to engage others to support key organizing opportunities, using members' passion and interests, you should seek or request local, state, and national training opportunities or dedicate time to volunteer in an existing campaign.

*Goal: Develop a written plan, with clear actions and dates, which increases your chance for completion.*

**Writing Your Plan**

| REFLECT | JOURNAL |
|---|---|
| What activities am I engaged in that will allow me to practice and strengthen my leadership? | |
| What resources am I using to work toward my goal(s)? | |
| What are some milestones that would indicate I am making progress toward my goal(s)? | |

# Step 5: Post Self-Assessment

After completing the activities listed in your plan (Step 4), complete the self-assessment again to determine your level of growth.

*Goal: To develop the habit of reflection, measure impact and growth, and determine future actions.*

**Reflect, Recognize, and Redirect**

It is likely that your leadership journey will bring challenges and opportunities, causing you to modify your plans. Take the time to celebrate milestones, be prepared to measure growth and look for opportunities to strengthen your leadership.

As you reach milestones, consider using the chart below to measure and set new goals.

| | |
|---|---|
| **For the competency** *(ies)* **you chose, what is the new progression you have reached?** | |
| **Reflect on the behaviors for your new Progression Level with the following prompts:**<br><br>What evidence supports that you have moved to this progression level?<br><br>What have you noticed about yourself?<br><br>What have you noticed about your influence on others?<br><br>What do you want to keep doing?<br><br>What might you want to do next?<br><br>How might you use this new skill to enhance organizational capacity? | |

**Next Steps:** Revisit Step 2, retake the self-assessment, record your score in the "Score/Date" column, and follow Steps 3 and 4 again. While you may find that your score is proficient in one or more competencies, leadership development is a journey, rather than a destination. Repeating the steps in this guide allows for reflection and continuous growth.

# Leadership
# Development