

**2017 – 2018 Local Strategic Plan**

**Local Affiliate Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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MSEA empowers members to make a positive difference in their professional lives in order to elevate the quality of public education for *all* students.

**STRONG**

Locals

**LEADING**

The Professions

**CULTURE**

Of Organizing

**SECTION 1:**

**LOCAL INFORMATION**

* **President of Association: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
* **Officers: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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* **Committee Chairs: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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***SUBMISSION DEADLINE: September 30, 2017 (or before)***

***Submit via email to grants@mseanea.org***

***Attention: Cathy Perry***

***Please only submit via EMAIL.***

 ***Note: Emailed copies must have electronic signatures included.***

***Thank you!***

**SECTION 2:**

**LOCAL SELF-ASSESSMENT & STRATEGIC PLANMSEA Local Self-Assessment & Strategic Plan Instructions**

*MSEA believes that strong locals are the heartbeat of the state association. The attached tool is provided by MSEA to help you accomplish the following:*

1. *Self-assess your local’s strength in ten key areas in order to reflect on what is working in your local and what to do differently moving forward – at the end deciding to either a) ADOPT best practices, b) ADAPT that which is promising but needs modification, or c) ABANDON that which is not working.*
2. *Using your self-assessment, build a strong plan for the upcoming year in the same ten key areas.*

**Who:**

* Local Governance and UniServ Directors should complete the assessment and strategic plan together.

**What:**

* The tool is broken down into ten key areas:

A) Association Program and Structure

B) Leadership Development

C) Membership Recruitment/Internal Organizing/Member Engagement

D) Public Relations/Communications

E) Negotiations

F) Government Relations & Political Action

G) Professional Issues

H) Fiscal Accountability

I) Community Engagement

J) Representation

* Each key area includes a self-assessment section immediately followed by a strategic plan section.
* For the Self-Assessment sections:
	+ Read the key area’s description to understand the context of the information.
	+ Use the guiding questions to begin a dialog about your local’s effectiveness in the given area.
	+ Use the rubric provided in the table (ranging from 1-Beginning to 4-Accomplished) to rate your local’s performance in each subset area.
* For the Strategic Plan sections:
	+ Using your analysis from the self-assessment section of each key area, establish goals for the upcoming school year. There are some organizational SMART goals included in the strategic plan for your convenience to reference as you plan.
	+ Your self-assessment should also shape your development of activities and programs. As you evaluate your performance in each section, craft your activities and programs to move your local association towards the standards in the accomplished column from the self-assessments.
* Once completed, on the last page, use your rubric ratings to prioritize the ten areas for your local’s work in the coming year.

**Why:**

This tool is meant to encourage reflection, self-assessment, and the setting of targeted areas of growth—a cycle of strategic doing. MSEA will use the rubrics to develop a comprehensive statewide picture of locals’ priorities for growth and help us assess whether we have adequate supports and resources in place to help locals reach their goals. We want to be able to help all locals reach their goals effectively. It’s important that you are honest and reflective in filling out these pages so that MSEA resources can be directed in the most efficient way possible.

**A - Association Program and Structure**

Association Program and Structure focuses on the local association’s short-term and long-term viability. In other words, has the local established both short-term and long-term goals and are the goals evaluated based on their effectiveness? The committee structure is key to effective structure and planning.

**Guiding Questions for Discussion**

1. Does the local have a clear vision and mission?
2. Does the local have short- and long-term goals?
3. Does the local evaluate the effectiveness of the association program?
4. Does the local membership understand the governance structure at the local and state levels?
5. Does the local communicate programs and progress to the membership?
6. Do committees meet regularly and receive training?
7. Are the roles and responsibilities for committee chairs clearly spelled out and understood?
8. Does the local abide by its Constitution and Bylaws?

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| **1****Beginning** | **2****Developing** | **3****Proficient** | **4****Accomplished** |
| • A vision and mission exists, and the Board reviews these annually.• Board annually creates or revisits long-term goals; understands the implications of the organization’s strategy for own actions and tactics. Some goals are pursued, while others are only on paper. The local has a goal for raising PAC funds.• Officers understand the roles of their respective positions, attend monthly RAs, and regularly scheduled meetings.• There is no committee structure outside of the Executive Board. | • Local uses the purpose, culture and history of the organization, as well as educational/union trends, to influence the direction of their work.• Regularly (at least 2x/year) reflects on long-term goals in relation to membership motivations; adjusts to align with member and association resources.• Officers participate in state and national activities, committees, PD, etc.• Board sets short- or long-term goals for the association.• Some specific Board members are solely responsible for things such as political action or membership. | • Board empowers others and promotes a culture that appeals to the different motivations of members while recognizing the contributions of all.• Educates and engages members and others on association strategies and tactics to advance organizational long-term goals and priorities.• Goals are set for the local, based on the local action plan and state initiatives, identifying and recruiting emerging leaders. Board members provide input into the goals for the local. • Local has a few committees established but most are served on by the same small group of members with infrequent meetings.• Each committee has money set aside from the local budget as needed. | • Local implements strategies that move people to act and uses the mission, vision, and core values to drive their work and culture.• Creates value for members through clear and compelling long-term goals and priorities. Members drive the strategies and goals for the association.• Board regular and effectively engages members for the purposes of communication, feedback, and involvement in local, state, and national activities and initiatives, engaging members to accomplish goals, mentoring new leaders.• Has multiple established and active committees, with new and diverse membership, that meet regularly; committees receive at least annual training on how to conduct their work; each has their own budget; committees give regular monthly report at AR meetings and communicates to all members. |

**OUR PLACEMENT ON THE RUBRIC: \_\_\_\_\_\_\_\_**

**A - Association Program and Structure**

**REFLECTION/RATIONALE/NOTES:**

**A - Association Program and Structure**

***Action Planning Form***

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| **GOALS:** |

| **Activity/Program** | TargetAudience | **Purpose** | **Timeline** | **Person(s) Responsible** | **Budget** | **Comments/Evaluation/Outcome** |
| --- | --- | --- | --- | --- | --- | --- |
| What is the planned tactic/event/activity/program? | Who is the target?  | Why?  | Time of year? | Who are the main people responsible to lead this piece? | Cost involved | What are you looking to accomplish? How are you going to evaluate the success? |
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**B – Leadership Development**

Each local needs to develop its leaders from within. This involves active recruitment at all levels and also involves providing adequate training opportunities so that new leaders can become comfortable in their roles. In addition, leaders are encouraged to attend state and nationally sponsored activities (MSEA Summer Leadership Conference, NEA Representative Assembly, etc.) and the local should provide the financial means for leaders to attend the various functions.

**Guiding Questions for Discussion**

1. Does the local seek to identify new leaders?
2. Does the local recruit, develop and train leaders?
3. Is the leadership team in the local diverse and representative of the membership?
4. Do the local’s ARs understand what they are supposed to do at the building level?
5. Does the local have an AR Council that meets at least monthly?
6. Does the local utilize one-on-ones, surveys, focus groups, needs assessments, etc. to identify issues?
7. Does the local send representatives to the MSEA Summer Leadership Conference?
8. Does the local make association training available to all members and encourage attendance?

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| **1****Beginning** | **2****Developing** | **3****Proficient** | **4****Accomplished** |
| • Local executive board members double as ARs; no real training; ARs refer members directly to UDs; ARs’ primary role is one-way communication with the members at their work site.• Has no discernable leadership program; has no local leadership training program; knows of no members who aspire to leadership positions within or beyond the local. | • Has AR at most sites; one training is provided at the beginning of the year; ARs’ primary responsibility is to recruit new members at the start of each year.• Recognizes need to identify new leadership; seeks UniServ assistance for leadership training; informs members of possible leadership positions in MSEA and NEA.• Leaders identify their own leadership strengths and weaknesses and works to improve them. | • Every site has an AR or a contact person; training at least each semester; ARs communicating at least monthly with membership through email and building meetings; ARs participate in targeted membership recruitment; ARs understand and actively fulfill their basic responsibilities.• Actively recruits and trains emerging leaders through the local, state and national leadership development programs. • Builds a diverse group of leaders to take on greater roles and responsibilities in the association.• Leaders are continuously developed and challenged to grow through existing structures. | • Diverse executive board that is proportional to age, gender, race, culture, grade levels, etc. of membership.• Active rep or group of reps at almost every worksite; ARs are in constant communication with members and potential members; ARs are organizers who advocate for the Association; ARs are well trained in employee rights and problem solving.• ARs regularly conduct one-on-ones to surface new leaders, issues and interests within their work site.• Systematically recruits, develops, and trains new leaders; sends multiple members to all possible leadership trainings; assists local leaders to seek positions in state and national groups.• Develops succession strategies that ensure a smooth transition in leadership that sustains the association’s vision over time.• Local leadership training is developed and led by members, with UniServ assistance. |

**OUR PLACEMENT ON THE RUBRIC: \_\_\_\_\_\_\_\_**

**B – Leadership Development**

**REFLECTION/RATIONALE/NOTES:**

**B – Leadership Development**

In addition to your leadership development goals and plans, be sure to include plans for the following SMART Goal:

By December 31, 2016:

* Have a building representative identified for at least 90 percent of the worksites in each and every teacher and ESP affiliate.
	+ See next page for Building Rep Chart

***Action Planning Form***

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| **GOALS:** |

| **Activity/Program** | **Target****Audience** | **Purpose** | **Timeline** | **Person(s) Responsible** | **Budget** | **Comments/Evaluation/Outcome** |
| --- | --- | --- | --- | --- | --- | --- |
| What is the planned tactic/event/activity/program? | Who is the target?  | Why?  | Time of year? | Who are the main people responsible to lead this piece? | Cost involved | What are you looking to accomplish? How are you going to evaluate the success? |
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# (In lieu of filling in the table below, you may attach and email an electronic version of a building representative spreadsheet that you already maintain if it contains the same information requested in the table below. Please email to grants@mseanea.org.)

| **Name of Building Rep** | **Home Email address** | **School/Building/Location** | **Lead/Head Rep****YES or NO?** |
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**C – Membership Recruitment/Internal Organizing/Member Engagement**

Recruiting and maintaining membership is a key to building an effective local. Identifying new employees and inviting them to join is paramount as well as approaching non-members on an annual basis to encourage them to join. Effective locals have a continuing membership program.

**Guiding Questions for Discussion**

1. Does the local have a Membership Organizing Committee?
2. Does the local train Association Reps on best practices for engaging the members at their schools regularly?
3. Does the local regularly engage newly discovered building leaders in association activities?
4. Does the local identify new employees, agency fee payers, and potential members for association membership and create a plan to follow-up with them?
5. Does the local commit funds to membership recruitment & engagement?
6. Does the local have an on-going buddy system to orient new members?
7. Does the local encourage new members to become actively involved in the Association?
8. Do local leaders visit targeted schools to talk one-on-one with members, fair share payers, and potential members?
9. Does the local have a planned schedule for distribution of local, state, and national materials?
10. Does the local provide opportunities for members to meet together and socialize?

**OUR PLACEMENT ON THE RUBRIC: \_\_\_\_\_\_\_\_**

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| **1****Beginning** | **2****Developing** | **3****Proficient** | **4****Accomplished** |
| * Receives membership forms/materials and distributes them without personal contact.
* Has no membership organizing committee.
* Has no particular membership plan.
* Holds no regular events for membership.
* Has no trained leadership network to move the work of the association at the school level.
 | * ARs distribute membership forms/materials personally and asks other members to help them.
* Leaders, in conjunction with UD, power map the local.
* Develops a minimal membership recruitment & engagement plan in cooperation with the UniServ Director.
* Designs a leadership network that incorporates governance and AR’s in moving communications and accomplishing the work of the local.
 | * Local uses power map results to identify school & new leader targets.
* ARs establish a membership team to make a personal contact with individuals and to solicit membership; feedback is sought and recorded and shared with the local’s membership organizing committee. Plan has specific activities for members and new hires during first semester of school; feedback from ARs are examined by the local’s membership committee; schools with low membership are targeted.
* Utilizes established leadership network to move the work of the association.
 | * Membership teams personally recruit targeted individuals; after feedback is shared with local membership organizing committee, leaders visit schools and work sites.
* Has ongoing, yearlong plan that includes specific activities for members, potential members, and new hires; specific data is used to examine progress.
* Regularly educates and trains members of AND assesses and modifies the structure and implementation of leadership network
* Studies members and potential member concerns and needs; has several events for new hires, continuing members and potential members; personal contact is done before and after events; feedback examined for future events.
 |

**C – Membership Recruitment/Internal Organizing/Member Engagement**

**REFLECTION/RATIONALE/NOTES:**

**C – Membership Recruitment/Internal Organizing/Member Engagement**

In addition to your membership recruitment/organizing/membership engagement goals and plans, be sure to include plans for the following SMART Goal:

By the end of the membership year (August 31, 2017):

* Recruit at least 90 percent of new certificated hires (Teacher/Administrator Units)
* Recruit at least 75 Percent of the new Education Support Professional hires.
* Convert 25 percent of the fair share payers into full members (Fair Share Units).
* Convert 25 percent of potential member into full members (Non Fair Share Units).
* Reach at least 15,000 member engagements in our Time to Learn/Student Testing campaign.
	+ *This is for both statewide and county-level actions.*

***Action Planning Form***

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| **GOALS:** |

| **Activity/Program** | TargetAudience | **Purpose** | **Timeline** | **Person(s) Responsible** | **Budget** | **Comments/Evaluation/Outcome** |
| --- | --- | --- | --- | --- | --- | --- |
| What is the planned tactic/event/activity/program? | Who is the target?  | Why?  | Time of year? | Who are the main people responsible to lead this piece? | Cost involved | What are you looking to accomplish? How are you going to evaluate the success? |
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**D – Public Relations/Communications**

Developing an effective local does not stop with recruiting new members. Effective communication with the membership must be done on a regular basis. Training opportunities should be utilized by members of the Communications Committee to ensure that information reaches members in a timely and effective manner. In order for this to occur, adequate funds for communicate should be budgeted on an annual basis. Finally, communication also does not stop at the school/work site door. As advocates for public education, locals should conduct an ongoing public relations program in order to promote the local and education as a whole.

**Guiding Questions for Discussion**

1. Does the local have a Communications/PR Committee?
2. Has an internal communications network for the local been established?
3. Does the local maintain a website and/or social media sites?
4. Does the local produce at least a monthly print or digital newsletter?
5. Does the local effectively promote association activities to members?
6. Does the local’s budget contain specific funds for communications/public relations activities?
7. Does the local monitor media coverage?
8. Does the local speak with area media contacts on education issues?

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| **1****Beginning** | **2****Developing** | **3****Proficient** | **4****Accomplished** |
| • No messages in or out.• Uses 1-2 of the following: webpage, email, newsletters, social media, one-on-one relational meetings.• Mass communication – everyone gets everything.• No relationships with the press or only reactive relationships. | • Messages go out, but not received.• Uses 3-4 of the following: webpage, email, newsletters, social media, one-on-one relational meetings.• Understands how to differentiate communication, but not implementing it.• Has relationships with the press; proactively pitches stories.• President is media trained by MSEA. | • Process exists for two-way strategic communication with membership, including face-to-face conversations.• Develops and implements strategic and integrated engagement plans that utilize a variety of media, technology and social networks.• Tailors communications to appear to different audiences; adjusts the purpose, substances and style.• President and additional members are trained and active as spokespeople for the organization.• A press engagement strategy exists.* Evaluates communication strategy
 | • Develops and implements plans with consistent, persuasive, and purposeful messages that consider the unique needs of different constituencies.• Evaluates and adjusts communications plans for maximum effectiveness.• Implements a differentiated communication strategy that rallies a diverse set of stakeholders.• Press engagement strategy is long-term and multi-layers, and can influence agendas and actions.* Evaluates communication strategy & adjusts accordingly
 |

**OUR PLACEMENT ON THE RUBRIC: \_\_\_\_\_\_\_\_**

**D – Public Relations/Communications**

**REFLECTION/RATIONALE/NOTES:**

**D – Public Relations/Communications**

In addition to your other goals and plans, be sure to include plans for the following SMART Goal:

By the end of the membership year (August 31, 2017):

* Email addresses: Obtain personal (i.e., non-school) email addresses for a t least 75 percent of our members.

***Action Planning Form***

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| **GOALS:** |

| **Activity/Program** | TargetAudience | **Purpose** | **Timeline** | **Person(s) Responsible** | **Budget** | **Comments/Evaluation/Outcome** |
| --- | --- | --- | --- | --- | --- | --- |
| What is the planned tactic/event/activity/program? | Who is the target?  | Why?  | Time of year? | Who are the main people responsible to lead this piece? | Cost involved | What are you looking to accomplish? How are you going to evaluate the success? |
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**E – Negotiations**

Members often view the primary role of the association to negotiate the contract. To an extent, this is true, since the outcome of negotiations is a tangible collective bargaining agreement that impacts every member of the bargaining unit. Therefore, effective Locals needs to have a systematic approach to negotiations. Adequate training and preparation cannot be overstated. Preparation for future bargaining should begin as soon as the most recent contract is ratified. District budgets should be analyzed annually. Members should be surveyed for input into the process, and maintaining consistent communications with the MSEA UniServ Director is necessary.

**Guiding Questions for Discussion**

1. Does the local survey members for bargaining interests?
2. Does the local use MSEA Bargaining Goals to develop proposals?
3. Does the local establish short- and long-term salary goals?
4. Does the local provide ongoing training in negotiations and contract maintenance?
5. Does the local analyze the district budget to develop proposals and make comparisons to other settlements?
6. Does the local maintain notes for each bargaining session?
7. Does the local participate in MSEA’s Coordinated Bargaining Council?

**OUR PLACEMENT ON THE RUBRIC: \_\_\_\_\_\_\_\_**

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| --- | --- | --- | --- |
| **1****Beginning** | **2****Developing** | **3****Proficient** | **4****Accomplished** |
| • Only one-way communication from bargaining team to members occurs. • Leadership obtains copy of goals and shares with bargaining team.• Bargaining and contract maintenance teams (grievance committee) have neither trained in a long time nor utilized theory to drive decisions about salary schedules.• Leadership and bargaining team is educated on salary schedule theory and develops compensation goals.• Leadership creates an internal organizing committee to share written communications around bargaining.• Local establishes a standing external organizing committee that plans community events.• Local has a very limited understanding of the district budget and financial condition of the district or relies solely on MSEA staff for an understanding.• Local team members’ roles are somewhat defined and one member takes notes during sessions.• Local does not follow the Bylaws for contract ratification, the process may be out-of-date or has no defined process in the bylaws.• Local sends a representative to regional CBC meeting. | • Local sends out electronic bargaining survey to members and does little or no communication back out to members regarding the results.• Bargaining team engages in discussion with UniServ Director for deeper understanding of goals.• Bargaining and contract maintenance teams do some training, and have a basic understanding of salary schedule theory.• Leadership formally adopts compensation goals.* Leadership develops an internal organizer for each building.

• External community organizing committee plans and carries out community events during bargaining.• Local has an understanding of the district budget and financials, however does not use it to develop salary proposals.• Local assigned two team members to take notes; notes are reviewed and become part of the local’s records.* Local sometimes follows the Bylaws for contract ratification.

• Local representative participates in regional CBC and shares information learned with local bargaining team. | • Electronic survey distribution coincides with building meetings to promote participation in the survey and then shares results.• Goals are incorporated into proposals.• Bargaining and contract maintenance teams do joint training and have a good understanding of salary schedule theory.• Membership is educated on salary schedule theory and adopts goals.• Internal organizer shares strategic information with members in their building through ten minute meetings or one on one conversations.• External organizing committee engages parents and organizations in one on one conversations about educational issues and hosts community events to create the association’s visibility in the community year round.• Local analyzes the budget and financials to develop salary proposals.• Local has a plan to archive minutes of bargaining sessions; and notes are used to inform issues during grievance representation or follow up bargaining.• Local has reviewed and updated the Bylaws for contract ratification and follows the process.• Local shares resources and proposals with counterparts in CBC. Works to engage other organized groups in the school district for coordination.  | • Local surveys members via electronic survey, building meetings, and one-on-ones then shares out results and how the survey results were used to draft proposals.• Goals are incorporated into proposals and shared with membership.• Bargaining and contract maintenance teams do joint trainings for veteran and new members and communicate regularly; salary schedule theory drives salary schedule decisions.• Membership establishes a compensation policy that guides local decision-making.• Members engage by taking strategic action in support of the bargaining process.• Local is seen as a leader in the community among parents and organizations; the community seeks its opinion on educational issues.• Local team works with UniServ Director to analyze the district budget and financial information to develop salary and other financial proposals to create support with members.* Bargaining team review notes from prior negotiations before developing new proposals in future contract negotiations.

• Local has updated Bylaws for contract ratification, notifies members of the process in writing and in person, and organizes for high participation in the ratification vote.• Local communicates regularly with counterparts in CBC to develop and implement strategy, assess progress and coordinate proposals and settlements. |

**E – Negotiations**

**REFLECTION/RATIONALE/NOTES:**

**E – Negotiations**

***Action Planning Form***

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| **GOALS:** |

| **Activity/Program** | TargetAudience | **Purpose** | **Timeline** | **Person(s) Responsible** | **Budget** | **Comments/Evaluation/Outcome** |
| --- | --- | --- | --- | --- | --- | --- |
| What is the planned tactic/event/activity/program? | Who is the target?  | Why?  | Time of year? | Who are the main people responsible to lead this piece? | Cost involved | What are you looking to accomplish? How are you going to evaluate the success? |
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**F – Government Relations & Political Action**

The collective voice of MSEA represents, arguably, the most influential voting group in Maryland. Effective locals recognize the potential impact MSEA can have the local, state, and national levels. Advocating for public education is not without cost, however. As a result, locals must develop and maintain an ongoing program to encourage members to participate as both organized people and organized money.

**Guiding Questions for Discussion**

1. Does the local communicate with members regarding current state and national legislative matters?
2. Does the local inform members about their role in the political process?
3. Does the local participate in lobbying activities in Annapolis and at home?
4. Does the local run an annual PAC drive?
5. Does the local communicate recommended candidates to the membership?
6. Does the local participate in and provide workers for all recommended races?
7. Does the local communicate the links between political action and educational policy-making to members?
8. Does the local recruit potential school board members who are advocates for public education?
9. Does the local regularly attend school board meetings?
10. Is political action part of the local’s long-range plan?

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| **1****Beginning** | **2****Developing** | **3****Proficient** | **4****Accomplished** |
| • Local participates in elections at the local level when the opportunity arises.• Fewer than 5% of members contribute to the PAC.• Has minimal interest or awareness of the legislative action programs of MSEA/NEA; is opposed to involvement in GR priorities. | • Endorses candidates at the local level through a transparent process; participates in MSEA/NEA political campaigns.• Fewer than 10% of members contribute to the PAC.• Has members who are becoming aware of legislature and political action through information provided by the Association. • Local educates membership for awareness of MSEA/NEA legislative program issues and positions. Members understand the PAC. | • A member-led GR committee develops candidate interview questions and interviews potential candidates for endorsement.• The local works with MSEA/NEA on political campaigns and devises their own, local strategies for implementation.• PAC fund exists and an annual PAC drive is held by the Local.• At least 15% of the membership actively donates to PAC.• Members participate in the Local’s legislative lobby program.• Leadership attends school board meetings; has a plan to report on major issues to ARs and all members; asks for member feedback. | • Identifies and recruits potential candidates for local, state and national races. • Member-driven GR committee endorses and supports campaigns through PAC funds and member organizing.• Local engages with community to organize around pro-public education candidates.• Members participate in election day activities to support candidate campaigns.• Over 25% of the membership actively donates to the PAC via payroll deduction.• Members participation in the local’s legislative and political action programs and are aware of office-holders’ positions on educational issues.• Local has a functioning lobby team comprised of rank and file members with the ability to generate member involvement, prepares talking points, and encourages membership to present at meetings. |

**OUR PLACEMENT ON THE RUBRIC: \_\_\_\_\_\_\_\_**

**F – Government Relations & Political Action**

**REFLECTION/RATIONALE/NOTES:**

**F – Government Relations & Political Action**

In addition to your other goals and plans, be sure to include plans for the following SMART Goal:

Between November 30, 2016 and November 30, 2017:

* PAC Fundraising: Increase the percentage of MSEA members making payroll deduction PAC contributions by 2 percent of membership (e.g., from 17.1 to 19.1 percent)

***Action Planning Form***

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| **GOALS:** |

| **Activity/Program** | TargetAudience | **Purpose** | **Timeline** | **Person(s) Responsible** | **Budget** | **Comments/Evaluation/Outcome** |
| --- | --- | --- | --- | --- | --- | --- |
| What is the planned tactic/event/activity/program? | Who is the target?  | Why?  | Time of year? | Who are the main people responsible to lead this piece? | Cost involved | What are you looking to accomplish? How are you going to evaluate the success? |
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**G – Professional Issues**
Strong locals advocate for quality for all school professions, and promote the association’s role in advancing education transformation, school environments, and student learning. We build capacity for continual improvement and learning and show educational leadership. Strong locals understand their role in student learning and leading our professions, and advocate for policies and strategies that positively impact those roles by analyzing and applying research, policies, and trends to their advocacy work.

**Guiding Questions for Discussion**

1. Does the local utilize professional cohorts to analyze educational & professional trends?
2. Does the local drive collaborative decision-making on key professional issues?
3. Does the local research educational & professional trends to determine their advocacy priorities?
4. Does the local take an active role in promoting the integrity of the professions?

**OUR PLACEMENT ON THE RUBRIC: \_\_\_\_\_\_\_\_**

|  |  |  |  |
| --- | --- | --- | --- |
| **1****Beginning** | **2****Developing** | **3****Proficient** | **4****Accomplished** |
| • Local governance understands the value of continuous learning and improvement in our professions.• Local governance understands the historic, current, and emerging role that the association plays in our professions.• Local governance understands the policies and strategies that impact our professions and student learning and effectively communicates this with the membership.• Local governance understands that research, policies, and trends impact public education and communicates this to the membership. | • Local governance communicates professional development opportunities to the membership.• Local governance provides PD to membership in order to educate them on importance of the role of the association in student learning and leading our professions.• Local governance and other association leaders forge alliances and agreements that positively impact our professions and student learning.• Local governance provides forums and/or PD on research, policies and trends that impact public education. | • Local governance advocates for meaningful development inside our professions by identifying emerging leaders and energizing members and our diverse set of educational stakeholders.• Local governance and other association leaders identify and promote own members’ credentials and expertise, ensuring association leadership of our professions.• Association leaders and members actively participate in focus groups and other forums to lend insight, voice and action to local and state decision making regarding issues that impact our professions.• Local governance collaborates with our diverse group of stakeholders to conduct, evaluate and communicate education research and practices. | • Local governance and leaders build a culture of professionalism that illustrates the association’s commitment to continuous learning—i.e. professional cohorts assist governance in training members to further their professions.• Local governance along with other association leaders help drive collaborative decision making and policy on our key professional issues.• Local governance and other association leaders help to lead the professions by anticipating challenges and putting in place proactive strategies.• Locals drive effective policy content based on deep understanding of research. |

**G – Professional Issues**

**REFLECTION/RATIONALE/NOTES:**

**G – Professional Issues**

***Action Planning Form***

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| --- |
| **GOALS:** |

| **Activity/Program** | TargetAudience | **Purpose** | **Timeline** | **Person(s) Responsible** | **Budget** | **Comments/Evaluation/Outcome** |
| --- | --- | --- | --- | --- | --- | --- |
| What is the planned tactic/event/activity/program? | Who is the target?  | Why?  | Time of year? | Who are the main people responsible to lead this piece? | Cost involved | What are you looking to accomplish? How are you going to evaluate the success? |
|  |  |  |  |  |  |  |

**H – Fiscal Accountability & Business Management**

Effective financial management helps to accomplish the goals of the association. Managing budget development, promoting financial integrity of the association, and utilizing data to analyze trends and inform decision-making are all key components of this work.

**Guiding Questions for Discussion**

1. Does the local create and adopt a budget each year, in accordance with the process in its Constitution and Bylaws?
2. Does the local regularly communicate internal budget information to the membership?
3. Does the local undergo a yearly financial audit?
4. Are the goals of the local reflected in the budget’s financial priorities?

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| --- | --- | --- | --- |
| **1****Beginning** | **2****Developing** | **3****Proficient** | **4****Accomplished** |
| * + Understands business, planning, and budgeting process.
	+ Understands the fiduciary requirements and demonstrates integrity in financial transactions.
* Understands the importance of recognizing data and implementing into budget.
 | * + Understands the importance of fiscal responsibility.
* Ensures all officers and board members are trained on their fiduciary responsibilities.
	+ Accomplishes the goals of the association by strengthening its fiscal health.
	+ Recognizes implications of union and educational trends on decision-making.
 | * Ensures business policies reflect financial best practices.
* Has financial records and financial practices professionally audited at least every other year.
* Increases association resources and infrastructure to accomplish strategic objectives.
* Builds support for strategic objectives through membership awareness.
 | * Uses strategic planning and the development of outcome based goals to create budgets and increase investments.
* Uses results from professional audit to inform and modify future bookkeeping and financial practices. Makes a good faith effort to correct any negative findings from the professional audit.
* Increases budget sustainability.
* Utilizes business trends and data analysis to make decisions that maximize goals, plans, and strategies for growth.
 |

**OUR PLACEMENT ON THE RUBRIC: \_\_\_\_\_\_\_\_**

**H – Fiscal Accountability & Business Management**

**REFLECTION/RATIONALE/NOTES:**

**H – Fiscal Accountability & Business Management**

Use this section to set internal operations goals (e.g., set a realistic balanced budget, purchase and begin using QuickBooks to better manage Local finances, upgrade the photocopy machine, etc)

***Action Planning Form***

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| --- |
| **GOALS:** |

| **Activity/Program** | TargetAudience | **Purpose** | **Timeline** | **Person(s) Responsible** | **Budget** | **Comments/Evaluation/Outcome** |
| --- | --- | --- | --- | --- | --- | --- |
| What is the planned tactic/event/activity/program? | Who is the target?  | Why?  | Time of year? | Who are the main people responsible to lead this piece? | Cost involved | What are you looking to accomplish? How are you going to evaluate the success? |
|  |  |  |  |  |  |  |

**I – Community Engagement**

A strong local builds meaningful community partnerships in order to engage the community around issues supporting student learning and to act as a collective, compelling advocate for the organization’s goals. Locals engage in community service activities and mobilize to strengthen external relationships.

**Guiding Questions for Discussion**

1. Does the local seek and maintain strategic relationships with community organizations identified in a community power mapping exercise?
2. Does the local conduct regular community service activities?
3. Does the local communicate with parent and other groups about educational policy and school climate?
4. Does the local convene community stakeholders when discussing student learning?
5. Does the local participate in the creation and implementation of a collaborative organizing & mobilization plan with community groups?

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| --- | --- | --- | --- |
| **1****Beginning** | **2****Developing** | **3****Proficient** | **4****Accomplished** |
| • Has no community engagement for advocacy activities.• Has no partnerships with community organizations.• Has no community engagement around student learning issues.• Has no student, family, or community service activities. | • Connects association messages with various audiences with diverse points of view.• Power maps the community. Uses that information to identify community organizations to engage. Engages different and diverse organizations in the community to identify common issues.• Researches advocacy issues to better understand content and share key messages with community.• Does one event per year that benefits students.  No publicity involving the event. | • Builds coalitions by forging relationships with audiences.* Collaborates with different and diverse community organizations, and educates them on key issues.

• Creates and implements an advocacy engagement plan that supports student learning and leading the professions.• Schedules and publicizes a few events a year.  Success of events are communicated to memberships, administration, and school board. | • Unites disparate audiences around a common message to work cohesively and move a common agenda.• Transforms relationship with the community organizations to harness the power of collective action.• Organizes a collaborative mobilization plan around shared interests of union, educational communities, and legislative bodies.• Has a community service committee that schedules and participates in multiple service events a year; solicits members, non-members, and community leader participation. |

**OUR PLACEMENT ON THE RUBRIC: \_\_\_\_\_\_\_\_**

**I – Community Engagement**

**REFLECTION/RATIONALE/NOTES:**

**I – Community Engagement**

***Action Planning Form***

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| --- |
| **GOALS:** |

| **Activity/Program** | TargetAudience | **Purpose** | **Timeline** | **Person(s) Responsible** | **Budget** | **Comments/Evaluation/Outcome** |
| --- | --- | --- | --- | --- | --- | --- |
| What is the planned tactic/event/activity/program? | Who is the target?  | Why?  | Time of year? | Who are the main people responsible to lead this piece? | Cost involved | What are you looking to accomplish? How are you going to evaluate the success? |
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**J – Representation**

**Guiding Questions for Discussion**

1. Does the local have a Grievance Committee to deal with contract violations?

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| --- | --- | --- | --- |
| **1****Beginning** | **2****Developing** | **3****Proficient** | **4****Accomplished** |
| • Contract maintenance teams (grievance committee) have neither trained in a long time nor utilized theory to drive decisions about salary schedules.• Local does not have a grievance committee; members are aware of the grievance procedures in the NA; ARs report contract violations to the UniServ directors.• Local has a minimal internal grievance policy. | • Contract maintenance team does some training.• Local has a grievance committee; yet the UniServ directors are consulted prior to any action; local provides training at rep meetings; rep reports concerns at monthly rep meetings.• Local actively works to resolve grievances at every step of the grievance process. ARs are versed in the process and can advise and connect members with the grievance committee. | • Bargaining and contract maintenance teams do joint training.• Local has a functioning grievance committee with a chair who works with UniServ directors to address lower level building concerns; ARs identify member advocates for follow up training.• Local has a grievance policy that includes the decision-making process around representation, binding arbitration, etc., and includes information about the process in association publications. | • Bargaining and contract maintenance teams do joint trainings for veteran and new members and communicate regularly.• Local has a grievance committee and chair and a grievance rep in each site as part of the team of ARs at each site; a grievance rep at each site is responsible for moving grievances at the informal level; local consults with UniServ Director before reducing a grievance to writing.• Members see the value of the grievance process as the method for settling disagreements and knows how the internal process for engaging the grievance committee works. |

**OUR PLACEMENT ON THE RUBRIC: \_\_\_\_\_\_\_\_**

**J - Representation**

**REFLECTION/RATIONALE/NOTES:**

**J- Representation**

***Action Planning Form***

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| --- |
| **GOALS:** |

| **Activity/Program** | TargetAudience | **Purpose** | **Timeline** | **Person(s) Responsible** | **Budget** | **Comments/Evaluation/Outcome** |
| --- | --- | --- | --- | --- | --- | --- |
| What is the planned tactic/event/activity/program? | Who is the target?  | Why?  | Time of year? | Who are the main people responsible to lead this piece? | Cost involved | What are you looking to accomplish? How are you going to evaluate the success? |
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| --- | --- | --- |
| **Letter** | **Category** | **Rubric****Rating** |
| **A** | Association Program and Structure |  |
| **B** | Leadership Development |  |
| **C** | Membership Recruitment/Internal Organizing/Member Engagement |  |
| **D** | Public Relations/Communications |  |
| **E** | Negotiations |  |
| **F** | Government Relations & Political Action |  |
| **G** | Professional Issues |  |
| **H** | Fiscal Accountability & Business Management |  |
| **I** | Community Engagement |  |
| **J** | Representation |  |

**Priorities Worksheet**

*Based on your local reflection, rank the list to the left in order of priority. Your priorities should then be reflected in your local strategic plan for the coming year:*

#1 - \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

#2 - \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

#3 - \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

#4 - \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

#5 - \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

#6 - \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

#7 - \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

#8 - \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

#9 - \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

#10 - \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Submitted by:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_