



## Strategic Plan Quarterly Report December 2016

### 1. Professional Development Goal

School nutrition professionals will have the necessary knowledge, skills and expertise to administer, manage and deliver healthy school meal programs.

#### Objectives:

1. Increase SNA expertise and capacity in professional development programs for adult learners.
2. Increase availability of training/educational opportunities related to business operations of school nutrition programs.
3. **Increase availability of resources and opportunities to enable members to meet the USDA Professional Standards regulation, thereby increasing the value of SNA membership to school nutrition professionals.**

#### Priority Objective 3

Increase availability of resources and opportunities to enable members to meet the USDA Professional Standards regulation, thereby increasing the value of SNA membership to school nutrition professionals.

#### Strategies:

- Provide education to directors/managers on adult learning principles to help them improve professional development practices at the local level.
  - Developed an article for the June/July edition of SN Magazine, with accompanying quiz on learning styles, entitled *“Train the Trainer, Seven Secrets for Improving Your School Nutrition Training Efforts.”*
- Provide education to members who present at SNA meetings and webinars on adult learning principles.
  - Held webinar on practical tips for training adult learners on December 14, 2016. This information will also be shared with presenters who are doing education breakout sessions at 2017 Annual National Conference (ANC).
- Promote SNA as the resource for USDA Professional Standards. Prioritize and implement professional development planning.
  - Designed and planned SNIC 2017 to focus on innovation in school nutrition and included general sessions and learning labs on a host of critical topics in school nutrition.

- Conducted a comprehensive online assessment in collaboration with four state agency partners to identify the top training needs of school nutrition professionals at the director, manager and employee levels. Respondents from 49 states and various school district sizes provided insights into priority training topics.
- Shared findings from Training Needs Research with SNA state affiliates and membership. In addition, SNA's professional development offerings (webinars and training at ANC and other conferences) are being planned based on the findings and top priority training areas identified, including procurement, leadership, teamwork/management, innovative recipes and collaboration techniques with students to increase participation.
- Offered 10 webinars since August 1, 2016 on a host of critical topics.
- Developed a Virtual Expo which includes education sessions recorded at ANC in San Antonio, and creates another opportunity for members to enhance their professional development and meet their USDA Professional Standards requirements. Registration opened on November 15<sup>th</sup> and as of November 18<sup>th</sup>, 338 people have registered. The Virtual Expo will be open until April 30<sup>th</sup>.
- Secured funding to host the 7<sup>th</sup> SNA Executive Leadership Program in collaboration with Georgetown University on Saturday, April 1<sup>st</sup>. Between 50 and 60 directors will participate in a full day of graduate level education – *Leadership and Action: Achieving Mission Success*.
- Introduced real-time text streaming for all live webinars. This ensures that the hearing impaired can fully participate in SNA e-learning events.
- Promote the Certificate in School Nutrition Certificate and the School Nutrition Specialist (SNS) Credentialing Programs.
  - The **SNS Credentialing program** continues to grow. The November 2016 Credentialing Report shows that we have a **record 1,515 credentialed members** which is 41 more than the May 2016 year-end and 73 more than November 2015.
  - Developed and sent out Request for Proposal for new Credentialing Exam testing vendor as well as coordinated member based task force to review and select new vendor. Currently in the process of transitioning to HumRRO, new testing vendor, which will begin scoring tests in January 2017.
  - Coordinated meeting with Exam Writing Group to draft new questions for each of the nine content and knowledge areas of the exam; new exam to be develop sometime in 2017.
  - The **SNS Study Guide** and associated bundle with "*School Food & Nutrition Services Management*," continues to sell well with more than 750 copies of the guide sold since it's January 2015. 300 copies have been sold to date in 2016.
  - The number of **Certificate in School Nutrition** holders has dropped slightly to 19,622 certificate holders nationwide, which is 401 less than November 2015. Level 1&2 certificates continue to drop slightly; while Level 3 certificates continue to rise slightly.
  - Creating a testimonial based marketing campaign to promote the **Certificate program** to both certificate and non-certificate holders and the benefits of moving up levels. The campaign will launch in January 2017.
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- Research, evaluate and share best practices in school nutrition ethics.
  - Developing a new education program focused on school nutrition ethics – *“What Should You Do? Ethical Decision-Making in School Nutrition.”*
    - This program is being tailored to school nutrition professionals and will include an introduction to ethics, discuss why ethics in the workplace is important, instruct participants on identifying ethical dilemmas and how to utilize an ethical decision-making model.
    - Through the collaboration of the Nutrition & Research and Professional Development Committees, over 35 school nutrition specific cases have been developed for use with this training program. Directors and managers offering the training will be able to provide the introduction to ethics in either a live setting, or they can offer their staff the option of viewing the introduction via an online module.
    - Training materials will include an instruction manual for trainers to utilize as a guide as they educate their staff. Additionally, the course materials will include activities for staff engagement, handouts and slides.
    - The first offering of this program will take place at SNIC 2017 in a pilot format to further vet the material and then as pre-conference session at ANC 2017.
  - Creating a School Nutrition Procurement Ethics Procurement Task Force comprised of school nutrition directors, state agency staff and industry members to develop and recommend a plan to educate SNA members on school nutrition procurement ethics in a multi-year effort, and to review procurement ethics training materials.
- Develop and promote leadership development opportunities.
  - Planning a webinar on leadership training in the Spring of 2017. In addition, the 2017 National Leadership Conference for state affiliate leaders and national committee members will focus on strengthening leadership skills. At 2017 ANC, a 4-hour pre-conference on authentic leadership is scheduled.

## 2. Advocacy and Public Image

**Policy makers, school officials and parents will rely on SNA as the authority for designing and funding school meal programs.**

### Objectives:

1. Increase the recognition of school nutrition programs as integral in the education process.
2. **Increase efforts to improve understanding and knowledge by policy makers and other stakeholders of the scope and complexity of school nutrition operations.**
3. Increase the number of SNA members trained in advocacy.
4. Increase SNA's leadership role in the next Child Nutrition Reauthorization.

### Priority Objective 2

Increase efforts to improve understanding and knowledge by policy makers and other stakeholders of the scope and complexity of school nutrition operations.

### Strategies:

- Develop and deploy tools for members to use in sharing their school nutrition "stories."
  - Worked with Havit, outside marketing firm, to create a variety of tools to help members promote their programs and share their stories. Resources include: customizable school lunch and breakfast flyers to promote meal programs to parents; colorful, creative sharable content for use on social media platforms; an animated video that promotes the value of school nutrition programs and contributions of school nutrition professionals; and messaging documents for SNA leaders.
  - Hosted a successful webinar offering members strategies for "Promoting School Meal Programs."
  - Updated SNA resources to help members as they share their positive stories about school meal programs, including: a customizable PowerPoint presentation for members to use when presenting before the PTA or school board; a presentation for SNA leaders to use when talking with SNA affiliates about how to promote your school meal program; as well as new school nutrition photos posted to SNA's Flickr page.
  - Creating a blog on SNA's website where school nutrition success stories will be featured and cataloged. Blog is currently being finalized and will be promoted via social media channels and to media outlets.
- Develop and deploy tools for SNA's legislative team to demonstrate the unique no-one-size-fits-all dilemma of school nutrition operations.
  - Released the *2016 School Nutrition Operations Report* featuring trends in school meal programs. The report release and media outreach focused on diversity in meal programs and the wide variety of ways SNA members are working to improve their programs and encourage students to eat healthy school meals.
  - Assembling positive stories about school meal programs and sending them to Members of Congress who represent the corresponding school district. Story links are accompanied by related stats from the Operations Report to highlight how these stories represent national school nutrition trends.
- Develop and deploy tools for state affiliates to grow their legislative teams.

- Served as a state legislation resource by providing a report of all child nutrition-relevant state legislation introduced this year and highlighted current status.
- Assisted state affiliate executives and staff with lobbying efforts by providing information and references on state legislation.
- Organizing State Policy Toolkits that will be distributed to each state affiliate as the new Congress and Administration gets underway in January 2017.
- Enhance efforts to grow grassroots advocacy.
  - Continued to promote the #StoptheBlock initiative resulting in an additional 4,200 e-mails sent to Congress from SNA members since July and 16,209 in total.
  - Encouraged SNA members to write to their Senators insisting that they pass the Senate Child Nutrition Reauthorization bill. 660 emails were sent to Congress.
  - Educated members on the importance of voting in the November election through *Tuesday Morning*, e-mails and news stories. Voter resources were provided that allowed members to find their polling location and relevant voting information such as profiles of their local candidates.
  - Began promoting the Legislative Action Conference (LAC) “Sweepstakes” that encourages any “patriotic” activity including, but not limited to a legislator visiting a school cafeteria.
  - Expanded the SNA Action Network to include a page specific to policy-related school nutrition news for easier access and increased visibility.
- Revise and implement a legislative plan that is aligned with the five-year Child Nutrition Reauthorization (CNR) cycle.
  - Lead opposition to the House Education and the Workforce Committee’s *The Improving Child Nutrition and Education Act of 2016 (H.R. 5003)* which includes a three-state block grant pilot program.
  - Drafted and circulated to allied organizations a letter opposing block grants. The letter was addressed to the chairs and ranking members of the Committees that passed H.R. 5003.
  - Designed a distribution plan to provide state affiliates with #StopTheBlock pins to distribute at state conferences.
  - Met with SNA’s external Communications Consultant to review post-ANC block grant communications strategy.
  - Met with key Senate Agriculture Committee staff numerous times in an effort to advance the Senate CNR bill, and provided SNA member expertise on a variety of provisions.
  - Participated in multiple meetings with CNR stakeholders to review strategies to move the Senate bill forward.
  - Activated membership to urge swift passage of the Senate bill.
  - Met with Majority Counsel for the House Education and the Workforce Committee to reiterate opposition to the House bill and Block Grants.
  - Coordinated meeting with SNA leaders and Senate Agriculture Committee Chair Pat Roberts in mid-November to discuss CNR status and opportunities for collaboration in the Trump Administration.
  - Created an Ad Hoc Presidential Appointee Committee to identify qualified candidates for consideration at USDA under the new Trump Administration.

- Drafted and sent an article to members to inform them that Congress adjourned before passing CNR bill as well as FQA on status and what happens next.

### **3. Community**

#### **School nutrition programs nationwide will be strengthened through collaboration with members, state affiliates, industry and allied partners**

##### **Objectives**

1. Increase School District Owned Memberships and increase membership retention.
2. **Increase satisfaction and engagement among different demographic segments of SNA's membership.**
3. Remove barriers to participation in SNA activities by anyone interested in school nutrition.
4. Enhance the SNA and state affiliate partnership to align efforts to achieve SNA strategic goals.
5. **Enhance strategic partnerships with allied organizations.**

##### **Priority Objectives**

###### **Objective 2:**

Increase satisfaction and engagement among different demographic segments of SNA's membership.

###### **Strategies:**

- Improve our understanding of member demographics through qualitative and quantitative research.
  - Developing a member satisfaction survey to field in early 2017 to ascertain members' satisfaction and engagement.
- Apply initial research results to begin development of targeted tools and approaches to meet the needs of key demographic segments.
  - Creating a Young Professionals Task Force comprised of members between 25 and 40 years old to provide input on what is important to younger professionals working in the school nutrition profession and identify ways to enhance SNA's engagement with this important member segment.
- Expand opportunities for state agency/state association collaboration.

###### **Priority Objective 5:**

Enhance strategic partnerships with allied organizations and industry.

###### **Strategies:**

- Identify synergies between SNA and allied groups in pursuit of issues of mutual benefit and concern.
  - Created a SNA Allied Partner Tracking Report to track SNA and the School Nutrition Foundation's partnerships and status of projects with allied partners.
  - Partnering with the Healthy Schools Campaign on Cooking Up Change program.

- Establish opportunities to engage with allied partners.
  - Planning Partner Summits for late January 2017 to discuss how we can work together with allied partners to protect school nutrition programs.
  - Serving as a strategic partner with the National Farm to School Network.
  - Submitted an application for a Robert Wood Johnson grant with Action for Healthy Kids and nine other organizations working on the Every Kid Healthy Coalition.
- Expand opportunities for engagement with industry
  - Hosted Fall Industry Boot Camp on Nov. 9<sup>th</sup> and 10<sup>th</sup>. Thirty-four industry members participated which is the highest number to date. Evaluations indicated that attendees were very happy with the information shared and the opportunity to engage with directors.
  - Hosted 2016 Annual Patron Meeting on Nov. 16<sup>th</sup>. Forty-five Patron representatives and five school nutrition directors participated. All attendees enjoyed the information presented, the interaction with directors and the thoughtful discussion on clean labels.

## 4. Infrastructure

**SNA will have a financially sustainable funding model with a nimble governance structure and headquarters staff organization that is aligned with the strategic plan and reflects contemporary association business practices.**

### Objectives

1. **Increase the effectiveness and efficiency of decision-making and work systems.**
2. Increase the synergy of SNA and SNF.
3. **Increase recruitment and development of future SNA leaders.**
4. **Increase funding and resources to high priorities of the strategic plan.**

### Priority Objectives

#### Objective 1:

Increase the effectiveness and efficiency of decision-making and work systems.

#### Strategy:

- Develop and seek acceptance of a state affiliate agreement outlining how SNA and SNA affiliates support one another.

#### Objective 3:

Increase recruitment and development of future SNA leaders.

#### Strategies:

- Develop initiatives to support graduates of SNA's Future Leaders Program to encourage the continuation of their state and national leadership journey.
- Continue to improve and promote current leadership advancement opportunities.
  - Created a SNA Leadership Opportunities section on SNA website under About SNA.
  - Created a PowerPoint presentation on SNA Leadership Opportunities.
  - In 2017, there will be one Leadership Development Committee (LDC) representative as a talent scout at SNIC and two representatives at LAC and NLC. The full committee will attend ANC in their roles as talent scouts as they prepare for the 2018 election nominations process.
  - There will be opportunities for interested members at both NLC and ANC to learn more about national leadership opportunities, hosted by LDC representatives.
- Expand recruitment of under-represented member demographic groups in Association leadership positions.
  - There are 4 males (30%) and 2 (15%) minorities on the 2017 election ballot, both under-represented demographic groups in SNA leadership positions.
  - The LDC has both an employee/manager and a state agency employee, both elected to represent their region. Those two groups have usually not been represented on this committee and have brought helpful perspectives to the nominations process.

#### **Objective 4:**

Increase funding and resources to high priorities of the strategic plan.

#### **Strategies:**

- Review and reallocate available financial and human resources to meet the 2016-17 priorities, including sun-setting of programs as appropriate.
- Identify potential sources for new revenue.
  - Introducing a Virtual Trade Show in late January 2017 that will generate more than \$30,000 in new revenue.

## **5. Other New Initiatives**

#### **Advocacy**

- Develop and implement an initiative to seek commodity assistance for breakfast in the next Farm Bill.
  - Met with the CEOs of over 25 key agriculture organizations to discuss SNA's breakfast commodities initiative and gain support for the effort. Meetings resulted in full support of the concept developed by SNA.
  - Met with all Senate Agriculture Nutrition Subcommittee Republicans, and have begun meeting with Democrats as well, to gain support for breakfast commodities in the next Farm Bill. Feedback from the meetings has been positive.
  - Working with SNA consultant to develop leave-behind materials on USDA Foods and FAQ's.
  - Met with Clinton and Trump Agriculture Transition staff to discuss SNA's Farm Bill strategy.
  - SNA President and GAMR staff met with President/CEO of trade group to discuss enforcement and clarity opportunities on the Buy American provision.

#### **Membership**

- SNA currently has 58,311 members nationwide (which is 1,190 more than November 2015). and continues to be the highest in more than 15 years. This is 153 less members than May 2016 year-end, but this follow seasonal trends and membership remains at its highest in over a decade.
- Winners of the Back to School Membership Drive, which are. . .
  - 1-500 members: Kansas
  - 501-1,000 members: Arizona
  - 1,001+ members: Georgia
- Created new membership marketing materials, including new brochure targeting school nutrition employees and managers.

#### **Task Forces**

- Published *Solving the Procurement Puzzle: Managing the Complexities of Doing Business in K-12 School Foodservice* white paper in October 2016 as a result of the work of the Procurement Task Force.

- Creating four additional Task Forces listed below in addition to the three already identified in this report – State Affiliation Agreement, School Nutrition Procurement Ethics and Young Professionals to work on priority projects identified by the Board this year. Members selected to represent SNA’s seven regions, member segments and different sizes of school districts.
  - Procurement – Commodities
  - School Nutrition Financial Management
  - School Nutrition Chefs
  - SNA Long Term Position Statements

## 6. School Nutrition Foundation

### SNF Transformation Plan

#### Objectives:

- Create an organizational structure that will enable SNF to achieve its mission
- Improve the financial resources of SNA to allow for stabilization and growth
- Decrease SNA CEO’s responsibilities and time commitment to the Foundation
- Increase revenue to eliminate the need to pull from SNF reserves or receive support from SNA.

#### Actions completed

- SNF Board approval for Plan and Implementation Timeline
- SNF Board approval to utilize reserve funds for implementation of 2-year plan
- Request financial contribution from SNA to support Transformation Plan
- Develop job description for Executive Director and update Director of Fund Development job description

#### Actions in progress

- Recruitment of Executive Director
  - Search firm: Vetted Solutions
- Continue to implement the 2015 – 2017 Development Plan
- Provide quarterly reports to SNA Board of Directors
- Monitor SNF budget to limit the need to utilize reserves

### SNF Board of Directors

- Meeting on September 19 – 20, 2016
- Actions completed
  - Completed extensive review of bylaws
  - Welcomed new investment firm: Orion Investment Advisors
  - Approved new investment policy
  - Approved 2016-17 SNF Budget
  - Approved Gift Acceptance Policies
    - Guidelines for accepting other than cash gifts and/or gifts made under special circumstances
  - Approved SNF Committee Structure
    - Approved committee rosters
  - Approved Development Plan
  - Approved recommendations for SNF scholarships funded by SNA
- Quarterly conference call – December 9, 2016

## Scholarships FY2017

- Josephine Martin National Policy Fellowship-(LAC) 2017
  - Applications closed November 15
  - Recipient announced in January

## Year-End Financial Comparison July 2015 and July 2016

- Total Revenue Up by 9%
- Total Expenses Up by 9%
- Operating Loss: \$55,361 in FY16 compared to loss of \$45,803 in FY15
- Loss on Investments: \$19,948 in FY16 compared to loss of \$81,034 in FY15
- Net Loss: \$75,309 in FY16 compared to loss of \$126,837 in FY16

## Projects:

- **Breakfast in the Classroom, Cycle 3**
  - Target states: Alabama, Arizona, Georgia, Indiana, Kansas, Pennsylvania, Virginia
  - Total of \$2.8 million awarded to 21 school districts, 97 schools
  - Increase in breakfast participation: 27,000
- **Breakfast in the Classroom, Cycle 4**
  - Walmart Foundation grant of \$7.5 million over 3 years
  - Target states: Idaho, Louisiana, Mississippi, Missouri, Nebraska, North Carolina, Ohio, Oklahoma, Texas, Utah
  - Dollars will be granted to school districts who participate in Cycle 4
- **Collaboration with Share Our Strength**
  - **After-School Meal/Supper Programs**
    - Project completed
    - Resource guide developed
  - **Schools as Nutrition Hubs:** Case studies of schools offering multiple school meal programs
    - Focus groups held at ANC16
    - Identifying tools and developing new resources
- **School Nutrition Equipment Capacity Initiative**
  - 3-year project with 20 school district teams each year
  - School nutrition director; representative from business office; representative from superintendent's office
  - Project includes the development of resources for all SNA members
  - Grants of \$25,000 to participating school districts
  - Grant from the Pew Charitable Trusts for Planning Meeting
- **Collaboration with Environmental Research and Education Foundation (EREF)**
  - Study of food waste in school lunchrooms
- **Collaboration with Baylor College of Medicine**
  - Outcomes from implementation of the USDA competitive foods rules in Appalachia
  - Proposal submitted to Robert Wood Johnson Foundation in October 2016 for "Healthy Eating Research"

## 2017 Celebration of School Nutrition Heroes

- Monday, April 3, 2017, JW Marriott in conjunction with LAC
- 31 Nominations from 19 States
- Heroes to be selected by December 5, 2016
- Sponsors to date: \$198,750
  - 93.4% of sponsorship total for 2016
  - Exceeds sponsorship totals in 2014 and 2015

## Annual Fund

- FY16 Total \$34,622 compared to FY15 Total \$18,026
- % Increase 92.1%
- % over Budget 73.1%

## SNF State Ambassadors

- 44 States have SNF Ambassadors
- Helped at SNF Booth at ANC
- Have hosted SNF tables at State Conferences and Meetings
- Positive Impact on 2016 Annual Fund

## Sustainer's Circle

- Recognition for those making recurring gifts: monthly, quarterly, annually
- 11 members/8 making monthly gifts
- \$260 per month/\$3120 per year
- Average gift: \$32.50 per month

## Giving Tuesday

- November 29, 2016
- Broad promotion
- AccuTemp and its employees donate \$20 for each new donor