



Strategic Plan Quarterly Report July 2015

Updates in black = December 2014 Report

Updates in red = April 2015 Report

Updates in blue = July 2015 Report

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 the availability of resources and opportunities to enable members to meet the new federal Professional Standards.
4. Increase the value of SNA membership for school nutrition directors and their staff through education and professional development.
5. Increase funding for education and professional development programs.

Strategies:

1. Review and evaluate how education and training programs are currently delivered
 - Initial review completed with training documented in a grid by Key Area and Key Topic. More in-depth review to be completed over next few months at which time the grid will be shared with the Board.
 - Formed an inter-department staff team, the Professional Development Working Group, charged with reviewing priorities, assessing member needs and brainstorming new offerings. Team reviewed ANC breakout education session grid by Key areas, along with Education Committee and ANC Conference Chairs, and identified additional session ideas.
2. Understand and incorporate the principles of adult learning in all SNA training programs
 - Held initial training for Education Committee and SNA staff as a result of having NFSMI Executive Director Katie Wilson doing a one hour presentation.
 - Purchased books on principles of adult learning for staff to read and reference.
 - Recruiting new staff to support education initiatives and requiring experience with adult education.

- Hired new Director of Professional Development, Sharon Kulesz who has a Master's Degree and extensive background in adult education. Sharon started in May.
3. Promote and develop training around usage of SNA Keys to Excellence program, an online business planning tool for school nutrition directors to benchmark their programs, prepare for the 3-year administrative review and learn best practices
- Development of training program in progress including discussion with State Agency Director in Massachusetts to work together in designing training tying Keys of Excellence to administrative review.
 - Pilot testing of new Keys training will be conducted by Education Chair Gay Anderson in South Dakota. Plan is to roll out training to states in near future.
 - Piloted training program with State Agency in Tennessee in April and May 2015 with Melissa Livesay.
 - Discussed at April Board meeting and at SNA's Education Committee meeting the challenge that despite significant marketing and resources expended, only approximately 250 members have set up a 2014 KTE profile and around 100 have completed the KTE dashboard in full to date.
 - Analyzed collective staff time on Keys to Excellence and FTEs - upwards of 20 hours per week. In addition to the initial \$50,000 investment to create the dashboard, \$10,000 needs to be spent annually on maintenance and an additional investment of \$1,000 is needed to solve technical challenges. Next steps:
 - Continue basic maintenance and customer service for the Keys tool through ANC 2015; close data collection for SY 2013-2014 on August 1, 2015.
 - Sent out research survey to Keys users (and users that haven't accomplished much in the tool) to better understand which components are obstacles to completing the assessment and which components add value and relevant insights. Results will be available after ANC.
 - Based on survey results and user feedback, generate a long-term plan to determine the future of the online tool
4. Communicate the alignment of the Key Areas in Keys to Excellence with the SNS credentialing exam
- Communicating the alignment of Keys with the SNS Credentialing Exam in the new *Study Guide* which is ready to be sold to members by mid-January. The Four (4) Key Areas in the SNS exam are based on SNA's Keys to Excellence: Standards of Practice for Nutrition Integrity www.schoolnutrition.org/KeysStandards. It is important to note that USDA's Professional Standards for School Food Service are also aligned with these four key areas.
 - SNA's Keys to Excellence program which is referenced throughout the Study Guide, was designed to help schools achieve nutrition integrity goals at the administrative, management and operational level. This tool, through its standards of practice and indicators, defines national standards for quality programs and provides a framework for continuous program review, evaluation and improvement.
 - Additionally, in 2013, an online dashboard was created to allow school nutrition directors to compare their school nutrition program's performance in these four key areas with districts in their state and around the country. Visit www.schoolnutrition.org/Keys for more information

5. Identify implications and next steps for SNA's Certificate Program in light of Professional Standards
 - Changed name of program last spring to Certificate from Certification to properly name the program because SNA's Certificate program is not exam based where Certification programs are exam based.
 - Reduced number of hours for core courses from 10 to 8 to align with proposed Professional Standards requirements.
 - Removed GED/High School requirement so that Certificate program aligns the Professional Standards.
 - Will identify implications and next steps once final Professional Standards regulation released this year.
 - With the release of final Professional Standards in March, per Governing Council, the Certificate Program will be modified so that it better aligns with the rule. For example, CEUs for a Level 1 certificate are now based on member type so that the required training hours can be met.
 - Roll out and communication plan in development and includes webinar in May 2015 (295 members registered to date) and education session at ANC to communicate alignment of programming.
 - Added a special Professional Standards section on SchoolNutrition.org to provide easy access to all related resources.
 - Enhanced marketing efforts and increased number of members in Certificate program by 229 more members which brings the total back over 20,000. The Certificate program continues to grow and now had 266 more certificate holders since May 2014. A number of states are starting to offer certificate and credentialing scholarships which should also help increase the total number of certificates.
 - Held Professional Standards webinar with USDA on April 1 with 500 plus attendees; two education sessions are scheduled for 2015 NLC.
 - Where possible, all SNA professional development (webinars, education sessions etc...) will be coded based on USDA Professional Standards Learning Topics.
 - Drafted codes for SNA training based on USDA Professional Standards Learning Topic codes. Comparison chart will be reviewed by USDA to make sure topics are coded correctly and to gain input on additional topic areas currently not reflected in USDA Professional Standards Learning Topics. Once USDA reviews chart, information will be shared with SNA members on webinar planned for May 27, 2015.
 - Call with Governing Council and USDA held on June 30th to discuss the USDA objectives for a USDA Certificate program that is addressed in HHFKA.
 - Developed new SNA Professional Standards Training Guideline toolkit that is posted on SNA's website. Toolkit to be shared with members at ANC.

6. Survey members to identify priorities and preferred delivery methods for obtaining training and professional development
 - Asked SNA's committees to identify SNA members' need which have been incorporated in the SNA Education and Training Grid referenced under Strategy 1. Used information to make sure that most popular training topics are included in ANC 2015 education breakout sessions.

- Pulled together SNA research done over the past few years where members were asked to identify training needs.
 - Awaiting release of Professional Standards before surveying members to identify training needed by topics based on new requirements.
 - Education Member Needs survey will be conducted later in the year, but continuing to ask committees for input on education needs.
 - Education Member Needs survey to identify members' education needs as they relate to Professional Standards will be fielded at ANC with incentive prize of a chance for members to win an iPad.
7. Study advantages and disadvantages of outsourcing content development
- Will address once Professional Standards are finalized and released.
 - This will be studied once training content is identified.
8. Evaluate SNA staffing needs to create and deliver content
- Addressed in staff realignment and new headquarters organization which freed up salary dollars in the operating budget to hire an Education Program Manager in addition to a new Director of Education.
 - Drafted revised job description for Director of Education and new job description for Program Manager which require knowledge and experience in education planning and development and specifically with adult learners.
 - Recruitment underway for Director of Education and many resumes received. Program Manager to be hired once Director of Education on board.
 - Hired a new Director of Education with a Master's Degree and extensive background in adult education. New staff member begins in early May.
9. Identify funding sources to support education initiatives
- Have sent out proposals to several companies and organizations to see funding to support development of training for Keys to Excellence program. To date, have not been able to find a funding match.
 - More proposals to be developed and sent out after education priorities are developed and staff on board.
 - Proposal developed for industry to sponsor ANC "top picks" webinars.
 - Proposal for SNA and State Agencies to co-host webinar workshops to support Professional Standards (using SAE funds) will be shared with State agencies.
10. Develop business plan for implementing professional development and education programs
- Business plan to be developed once Professional Standards are released and education priorities are set.
11. Explore partnerships for program content development
- Partnerships will be explored once Professional Standards are released and education priorities are set in Professional Development Plan to be developed once Education Needs Survey results are analyzed.

12. Develop study guide and preparation course for SNS credentialing exam

- Put out RFP and hired consultants (Dorothy Pannell-Martin, Julie Boettger and Jeannie Sneed) to develop new SNS Study Guide which will be available for sale in mid-January.
- Negotiated agreement with Dot Pannell to be able to sell her new book, *School Foodservice and Nutrition Service Management* 6th edition and SNS Study Guide to members preparing to take the exam.
- The SNS Study Guide and accompanying bundle which includes *School Foodservice and Nutrition Service Management* 6th edition have been well promoted since the initial launch at SNIC in January. As of March 31, sales total \$23,000 and this includes over 200 study guides. As of May 31, 2015 sales total \$33,000 which includes over 300 study guides.
- Completed review of SNS Credentialing Exam to identify items to be updated. Thirty members with the SNS Credential are serving on the SNS Exam Item Writing Task Force to help draft new questions. These will be reviewed by the SNS Exam Subcommittee Task Force responsible for updating the new exam which will be released at 2015 ANC in Salt Lake City. Exam Review Committee met at SNA headquarters on April 10 and 11 and completed the review of the new and updated SNA credentialing exam questions. New SNS Credentialing exam on track to be introduced in July at ANC. The new exam will launch at ANC and over 75 candidates are scheduled to sit the exam. This compares with 48 candidates at ANC Boston.
- Reviewed list of SNS Credentialing exam resources and reduced to make amount of references more manageable. Can be accessed on SNA website under Credentialing exam. With the new exam, the references are being reviewed again.
- Increased marketing efforts which have resulted in 65 more members being SNS credentialed compared to last November with 1,344 in total. Even with the exam on hold until ANC in July the number of members with the SNS Credential remains at the highest ever at 1,361 at the end of February 2015. This is 66 more than May 2014 and 92 more than February 2014. In May 2015, we had 1,352 credentialed members which is 57 or 4% more than the May 2014 year-end. We should see a significant boost in the numbers after ANC.

13. Provide more scholarships and other ways to reduce the costs of participation in SNA education programs

- Recommended to SNF Board that some of its reserves be used this year to fund \$25,000 in scholarships for SNA members to demonstrate that SNF is enhancing its commitment to education for school nutrition professionals. SNF Board approved the use of reserves.

14. Work with SNF to increase scholarship funding to support members working towards a degree.

- Same as above

15. Create a program of study in content areas where education for school nutrition professionals (major city directors, state agencies, district directors and their staff) is needed, but not currently offered.

- Working on identifying Ethics training for school nutrition directors as well as creating a course on how to prepare for an administrative review.
- Additional training to be identified by member segments once Professional Standards are released and education priorities are set.

- Exploring developing pre-cons at SNIC for small, medium and large district director segments.

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 policy makers' understanding of the business of operating school nutrition programs.
3. Increase allocation of financial and staff resources toward advocacy (lobbying and public relations).
4. Increase the number of SNA members trained in advocacy.
5. Increase SNA's leadership role in the next Child Nutrition Reauthorization.

Strategies:

1. Implement and periodically review elements of the 3-year legislative plan to support Child Nutrition Reauthorization
 - Updated 3-year plan that was reviewed/approved by Public Policy and Legislation Committee.
 - Held Congressional Staff Briefing on October 14, 2014 with more than 50 in attendance.
 - [Held Congressional Staff Briefings on June 11, 2015 with House and Senate staff.](#)
 - Held Cafeteria Site Visit for Congressional Staff on October 22, 2014 in Montgomery Blair High School cafeteria with more than 25 in attendance.
 - Met with more than 150 Hill members and/or staff in the fall 2014.
 - [Reached out to all 535 Members of the 114th United States Congress with SNA's 2015 Position Paper and support materials.](#)
 - Contributed to the re-election campaigns of Ed/Workforce Committee Chair John Kline and Agriculture Committee member Sen. Pat Roberts, key members in Child Nutrition Reauthorization (CNR).
 - [Provided SNA PAC contribution to Senator John Hoeven \(R-ND\).](#)
 - [Provided SNA PAC contribution to Rep. Todd Rokita \(R-IN\).](#)
 - Achieved legislative successes for SNA through the FY 15 Omnibus Appropriations Bill.
 - [Achieved legislative successes for SNA through the FY 16 Agriculture Appropriations Bill with sodium and whole grains language included in the bill.](#)
 - Drafted 2015 SNA Position Paper which identifies SNA's key positions for CNR as well as talking points which will be sent to Board for approval by mid-January.
 - [Met with primary House and Senate staff responsible for CNR 2015 Reauthorization – Agriculture Committee Chairman Roberts \(R-KS\), Agriculture Appropriations Subcommittee Chairman Jerry Moran \(R-KS\), Agriculture Committee members Sen. John Hoeven \(R-ND\) and Sen. John Boozman \(R-AR\); and House Education/Workforce Chairman Kline \(R-MN\).](#)
 - [Exploring SNA Hill Briefing for late spring.](#)
 - [Held three conference calls between GAO and SNA IAB/PPL Committees to share continued challenges on HHFKA implementation and potential impact on CNR 2015.](#)

- Convened SNA Working Groups to develop Association responses to the CACFP Proposed Rule, Administrative Review in the School Nutrition Programs and the CN Operations Study.
 - Participated in USDA Meetings regarding its Team Up for Nutrition Success and identified SNA representatives/staff to attend all of the 7 regional meetings held thus far.
 - SNA President Julia Bauscher testified at House Education and Workforce hearing, “Serving Students and Families Through Child Nutrition Programs” on April 15.
 - Worked closely prepping SNA KS member Cindy Jones who testified at the Senate Agriculture Committee hearing on “A Review of Child Nutrition Programs” on May 7.
 - Worked closely prepping SNA Income Vice President Dr. Lynn Harvey, who testified at the Subcommittee on Early Childhood, Elementary and Secondary Education hearing on "Child Nutrition Assistance: Looking at the Cost of Compliance for States and Schools" on June 11.
 - Worked with Sen. John Hoeven (R-ND)/Sen. Angus King (I-ME) and Rep. Rodney Davis (R-IL/Rep. Brad Ashford (D-NE) in the introduction of the “Healthy School Meals Flexibility Act” (S. 1146/H.R. 2508) – legislation making permanent the sodium and whole grains provisions within the FY 15 Omnibus Appropriations bill.
 - Drafted joint support letters with ACDA encouraging House and Senate members to cosponsor S. 1146/H.R. 2508. Legislation is currently supported by NSBA, ACDA, The School Superintendents Association (AASA), the Association of Educational Services Agencies, the National Rural Education Association, and the National Rural Education Advocacy Coalition.
 - Orchestrated (1) and signed on to four organizational letters to Congress encouraging commitment to strong child nutrition programs.
 - SNA President and SNA VP, Government Affairs and Media Relations, attended and presented at the annual meeting of ACDA.
 - Continued discussions with CNR stakeholders including: NSBA, ACDA, AASA, Action for Healthy Kids, Every Kid Healthy, NDC, Apple Association, National Pasta Association, FRAC and the National Association of State Departments of Agriculture.
2. Identify staffing needs and internal competencies for specific advocacy priorities.
 - Reallocated money budgeted for salaries and benefit in the FY 2014-15 Operating Budgeted to support hiring a Director, Federal Government Affairs.
 - Drafted job description and began recruitment in late November following the midterm elections hoping to recruit a Congressional staff member.
 - Hired a Director, Federal Government Affairs with extensive Hill experience that join the staff on April 27, 2015.
 3. Identify additional sources of funding for advocacy
 - Increased Advocacy budget by \$13,000 in FY 2014-15 Operating Budget to support additional advocacy efforts.
 - Reallocated salary dollars in FY 2014-15 Operating Budget to support hiring a Director of Federal Programs in order to enhance advocacy work.
 4. Develop policies and procedures to enable SNA to respond quickly to time sensitive issues and opportunities
 - Conducted Spokesperson Training with SNA CEO, preparing her to fill in as SNA Spokesperson when Exec Team is unavailable.

5. Identify partners to work with on research topics related to advocacy
 - Held session at 2015 Fall Committee Days with Board of Directors and Committee members to identify and prioritize school nutrition challenges and issues that need to be addressed. In addition, participants identified subject matter researchers at leading colleges and universities by school nutrition area or issue.
 - Working with PEW Charitable Trusts, Alliance for a Healthier Generation, National School Boards Association, National Governor's Association, Academy of Nutrition and Dietetics, Share our Strength.

6. Develop a plan to incorporate state agencies in the Child Nutrition Reauthorization effort
 - Scheduled a two hour breakout session at the 2015 Legislative Action Conference (LAC) with State Agency attendees to get their input.
 - Scheduled a precon for State Agency staff at 2015 ANC in Salt Lake City.
 - Seeking input from State Agency Section Advisory Committee.

7. Develop presentation tools and materials that focus on the business of operating school meal programs
 - Created SchoolNutrition.org/School Meals section on the new SNA website, which details the business of operating SN programs.
 - Incorporated messages on the budgetary/financial pressures for school meal programs into all media and advocacy materials, including SNA survey data.
 - Developed PowerPoint presentation on the business of school nutrition that was presented at the 2015 national Association of School Business Officials annual conference in Orlando, Florida in September 2014. Presentation to be updated and posted on SNA's website for members to access as a resource. **Presentation is continually updated and was used for National School Board Association annual conference. The presentation was updated and presented at National Restaurant Association annual conference in May 2015.**
 - **Developed a new infographic, interactive web-based map featuring "Cafeteria Challenges" across the country, and other materials to support the 2015 Position Paper, all highlighting these issues.**
 - **Focused the September 2014 issue of *School Nutrition* magazine on "Media Matters," featuring several articles developed to help members improve their public awareness skills and efforts. A follow-up issue on the same theme is planned for September 2015.**

8. Develop a public relations plan specific to the area of image of school nutrition programs
 - Implementing a year-round national outreach campaign including:
 - A social media campaign to educate parents about healthy school meals, including periodic Facebook posts, ads, promotions and contests, mom blogger outreach and a mom blogger tour of ANC.
 - Outreach to consumer and lifestyle magazines, national news shows, syndicated radio programs and top online news sites on school nutrition trends and hot topics.
 - Proactive local media outreach campaigns in key media markets for Back to School, National School Lunch Week, National School Breakfast Week, School Lunch Hero Day and Summer Feeding.

- Local media outreach promoting SNA award winners.
 - ANC/LAC national, local and political media outreach and promotion.
 - Magazine tour with NYC-based family magazine editors.
 - Identified and shared with Executive Team potential goals to enhance SNA’s public relations efforts beginning in fall 2015. Details to be shared with Board at July meeting.
9. Develop and deliver a training program to increase grassroots advocacy efforts
- Scheduled a precon at LAC on Federal/State/Regulatory Advocacy and Training with a paid content expert. LAC Precon was well received with feedback encouraging similar sessions in the future.
 - Updated PowerPoints and templates available on SNA website for in-state training.
 - Held sessions at LAC and ANC 2014 on how to advocate at the State Level.
 - Scheduled sessions on advocacy at the 2015 National Leadership Conference.
 - Scheduled sessions on advocacy engagement at all levels at ANC 2015.
 - Focused the February 2015 issue of *School Nutrition* magazine on the theme of “School Nutrition Advocacy,” providing articles on both the “why” and “how” of grassroots advocacy.
 - Government Affairs and Media Relations staff will present “Grassroots Advocacy and You” education session at SNA’s 2015 Annual National Conference.
10. Develop a campaign to create excitement about importance of advocacy as a member benefit
- Charged Member Services Committee with working on this strategy. Committee recommends campaign name of “Use Your Voice for our Children.”
 - Suggested getting quotes with pictures from children as an additional option for the letter writing campaign.
 - Created a place on the website where members can register for an account on SNA’s Take Action page to easily access legislator contact information and be included in critical letter writing campaign notices. Take Action user account links to advocacy software (Vocus) which allows SNA to track emails/letters/tweets between SNA members and legislator.
 - Producing regular articles included in SNA newsletters explaining the importance of advocacy and encouraging participation in advocacy efforts.
 - Published article in *School Nutrition* to create excitement about importance of responding to letter writing campaign requests and explaining ease of doing so through SNA’s Take Action page.
 - Exploring idea of creating an SNA “Top Advocate Club” to incentivize SNA member advocacy.
 - Developed and introduced new SNA Action Network logo to create buzz and excitement about getting involved and to encourage members to contact their legislators regarding the Healthy School Meal Flexibility Act. Exploring incentives to for “top advocates” such as a picture and blurb feature in *School Nutrition*.
 - Exploring Vocus (SNA advocacy software) social media abilities including allowing SNA members to tweet action alerts to their legislators.

11. Support state affiliates in state advocacy efforts

- Developed PowerPoint on advocacy for state leadership to use.
- Held a webinar, “Successful State and Local Advocacy Strategies” in May 2014 and “Communicating With Congress” in November 2014. Both webinars are archived on the SNA website.
- Published article in *School Nutrition* magazine (November 2014) on the importance of state advocacy.
- Provided additional research and guidance as needed. Continue to add to available resources and have requested states provide insight on tools they need.
- Developing state summaries of advocacy and policies. Published state summaries to webpage.
- Continued monthly emails with updates, tips, and summaries of state legislation.
- As states began 2015 legislative sessions, assisted states on wide range of legislative issues (fund increases or cuts, changes to Smart Snacks Fundraising policies, various school breakfast bills) by providing draft testimony and talking points, letter templates, and strategy plans.
- Drafting six month summary of state legislative sessions and will begin to lay out ideas for developing new policy plans for 2016.
- Reached out to select SNA members for their thoughts on Child Nutrition Reauthorization outside the scope of the SNA position paper, including concepts that can be addressed at the state level.
- Exploring additional online resources for state advocacy.
- Assist states with advocacy resources for their state conferences as requested.
- Developed a SNA PAC FAQ for state leadership and a PowerPoint template as state leaders work with members and do state collections.

12. Identify and use state members to enhance visibility at allied organization meetings in their states

- Beginning to implement in the 7 states (Alabama, Arizona, Georgia, Indiana, Kansas, Pennsylvania, Virginia) where the SNF Breakfast in the Classroom program is focusing in over the next two years by linking state associations with FRAC’s and NEA’s Health Networks local affiliates.
- Actively working in seven states to continue identifying districts to support with SNF’s Breakfast in the Classroom dollars. 2/3 of 25,000 more breakfasts a day goal has been met to date and working on wrapping up awarded districts. SNF actively is working on webinars and technical assistance videos to support Breakfast in the Classroom expansion.
- SNF presented grant opportunity at First Lady of VA’s Breakfast Summit and we promote through strategic outreach.

13. Develop a plan to increase PAC fundraising

- Plans in place to provide resources to state leadership at NLC and discuss state collections.
- PPT and FAQ developed for states to talk about PAC at state meetings.
- Working with PAC Board in outlining plans to expand fundraising efforts at ANC. Plans in place to collect on the exhibit hall floor and provide cups of coffee.

- PAC Booth will be in place in the marketplace area of ANC. It will be staffed by SNA PAC Board members and periodically by GAMR staff to answer questions about PAC and collect donations.

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 engagement in each membership segment.
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. Increase strategic collaboration with industry and allied partners.

Strategies:

1. Utilize directors as the gateway to deliver SNA member benefits for themselves, their school nutrition programs and their staff
 - Continuing to target Major City and District Directors to promote SNA programs and services. This is the reason that the number of members in Certificate program is back up over 20,000.
 - Continue to monitor the number of non-member directors in the top 100 school districts and then reach out to these directors with a personalized and tailored message from both national headquarters and local directors. As a result, have had successes in Columbus, Ohio and Fort Bend ISD in Texas.
 - In May 2015, we had 458 Major City Directors and 5,424 District Directors. These membership categories have shown significant increases of 51 and 65 respectively since May 2014.
2. Survey major city directors to identify ways to increase their engagement in the association
 - Reached out to Major City Directors to identify session topics that they would be interested in attending at 2015 ANC. CEP was identified as a hot topic specifically from a major city perspective. Education session on this topic in development.
 - More research to be done.
3. Develop marketing plan to target member and non-member district directors to grow School District Owned Membership
 - Continue to enhance marketing efforts for School District Owned Membership (SDM) program which has resulted in membership being the highest since 2001 with 56,381 members. Total number of SDMs is 22,997 which is 2,265 more than the previous high in May 2014. SDMs now account for 41 percent of the total membership.
 - SDM continues to grow and the Total number of SDMs is 24,003 which is 3,271 more than May 2014. SDM now accounts for 43 percent of our total membership.

- The total number of SDMs in May 2015 is 25,583, which is 4,851 more than the May 2014 year-end total. SDMs currently account for 46% of the total membership. All states associations are now participating in SDM.
 - SDM is SNA key mechanism for sustaining and growing our membership numbers. The May Year-End Membership Report shows that we have 56,129 members which is 198 more than May 2014 year-end. Although we didn't meet the 2014-15 growth goal of 57,611 members (3% growth), **overall membership remains at the highest levels in over a decade!**
4. Clarify the leadership path within SNA to increase national leadership pool
 - Will be addressed after new governance structure is in place.
 5. Develop sponsorship packages to increase revenue and return on investment for industry sponsors.
 - Discussing with Industry Advisory Board at January 2015 meeting.
 - Plan to begin implementation in FY 2016-2017
 - Identified IAB members to serve on a sponsorship task force and conducted a conference call in February 2015. Two sponsorship surveys are being developed—one to current sponsors and one to non-sponsoring industry members. These will be fielded in April.
 - A comprehensive list of SNA Assets has been updated.
 - Draft packages will be developed and shared with SNA senior staff and the IAB for review and input.
 - The implementation date for launching the new sponsorship packages has been pushed to 2016-2017. SNA will continue to sell sponsorships a la carte for 2016.
 - Sponsorship survey fielded and analyzed.
 - Draft packages are being developed for review by CEO, SNA Senior Staff and the IAB.
 - 2016 Sponsorship Brochure created and will be available at ANC in Salt Lake City.
 6. Review bylaws to assess relevance of member segments in today's environment.
 - Addressed in mega issue discussion held by the Member Services Committee which is recommending that SNA streamline the membership categories over the next two years resulting in the number of categories being reduced from 15 to 10. This aligns to the number of membership categories that similar sized organizations use and will clarify and simply the membership structure.
 7. Evaluate and prioritize the value of membership for each member segment
 - Fielded a Value Proposition Survey for Industry in the Fall of 2014
 8. Create a state affiliation agreement outlining how SNA and state affiliates will support each other
 - The state affiliation agreements will be created after governance changes are determined and announced.
 - Created a background paper for the mega-issue discussion for July 2015 Board meeting around how to make state affiliate agreements mutually beneficial for the national and state organizations.
 - Included as strategy in 2015-16 Annual Plan.

9. Identify and eliminate barriers to participation in SNA
 - [Included as strategy in 2015-16 Plan of Action.](#)
10. Study and resolve issues around state only membership
 - Charged Member Services Committee to have mega-issue discussion around this issue.
 - Member Services Committee held discussion at October Committee Days and provided recommendation that a plan be created to sunset state-only membership in the next five years by offering tailored and collaborative transition plans including grandfathering and free membership incentives to the impacted states.
11. Build participation in a future leaders program for state affiliates
 - Conducted leadership training (Nancy Rice and Sara Sanders) in Washington State in February 2014.
 - Provided leadership training (Jean Geraghty) at Midwest Regional Meeting in November 2014.
 - [50 Future Leaders from 29 states attending Future Leaders Program at 2015 NLC; the largest class to date.](#)
12. Target allied partners that are aligned with SNA programs/priorities
 - Continue to work with the National School Board Association (NSBA) on advocating for changes in school nutrition requirements. SNA (Julia Bauscher and Patti Montague) exhibiting at NSBA annual conference in March and planning to do an education breakout session with NSBA Director of Federal Programs, Lucy Gettman.
 - Met (Patti Montague and Cathy Schuchart) with representatives of PEW, AND and CSPI in December 2014 to discuss how we can work together on 2015 Child Nutrition Reauthorization of mutual issues of concern including increased funding. Committed to continue meeting.
 - Signed on to letter with FRAC and other allied organizations requesting the White House to support increasing funding for Child Nutrition Programs in the FY 2016 budget.
 - Signed on to letter with PEW and other allied organizations addressed to Secretary Vilsack requesting that grants for equipment grant be open to all school districts and not just those with high free and reduced participation.
 - Working with AND and the Society for Nutrition Education and Behavior on white paper on Nutrition Integrity in Schools. Nutrition Committee Chair Carol Weekly will be lead contact.
 - Continuing to work with the National Dairy Council on its Fuel Up to Play initiative.
 - Presented (Patti Montague and Lora Gilbert) at ASBO national conference in September 2014 as well as exhibited.
 - Participating in National Breakfast Coalition with a number of allied organizations.
 - Participating in the Every Kid Healthy initiative headed up by Action for Healthy Kids and serving (Patti Montague) on Steering Committee.
 - Met with Executive Director of School Nurses Association in early November to forge relationship and discuss potential ways two organizations can work together.
 - Work with USDA MyPlate Kids group on a myriad of tasks. Specifically on promotion of a kids video contest. [Video winners have been identified and shared.](#)

- Exhibited at national NSBA conference in March 2015 as well as presented (Julia Bauscher and Patti Montague) at education breakout session – “The Serious Business of School Nutrition.”
- Met with NSBA to discuss CNR 2015 potential collaboration opportunities; reached out to CGCS for same.
- Signed on to four organizational letters sent to Congress demonstrating support for maintaining strong child nutrition programs.
- Continue partnership between Alliance for a Healthier Generation and *School Nutrition* magazine team to cross-promote key initiatives and share leads/resources.

13. Identify and offer leadership skills training and opportunities through state affiliates

- Conducted governance training and facilitated strategic planning in 10 states since new SNA Strategic Plan introduced to state leaders in April 2014.
- Compiled state association Plan of Action tracking grids for seven SNA regions. Demonstrates that states are utilizing SNA’s new Strategic Plan and structuring it around the four strategic goals.
- Offered state planning sessions at National Leadership Conference, facilitated by the Regional Directors.

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.

Strategies:

1. Redesign staff structure to support new strategic plan
 - Worked with Glen Tecker and Leigh Wintz from Tecker International, consultants that SNA contracted with on the Strategic Realignment Project and development of the new Strategic Plan, in late August to review and realign the SNA headquarters staff structure required to support the new Strategic Plan.
 - Finalized new SNA staff structure and announced new structure in mid-November 2014
 - Updated staff job descriptions and other internal documents based on new staff structure which was effective January 1, 2015.
 - Added critical position in Service Center to support volume of member calls and inquiries using salary funding savings resulting from staffing realignment. Previously this position was abolished back in 2008 when expenses had to be reduced.

- The overall budget for salaries/benefits is only increasing by 3.37% over the current year due to the savings from the staffing realignment. A total of \$74,420 in salaries/benefits savings was achieved. The savings contributed to the overall funding for the addition of one new staff position in the current year and one for next year.
2. Work with the SNF Board of Directors to maximize the relationship between SNA and SNF to better align the work of both organizations with the SNA strategic plan.
 - Met with SNF Board of Directors in July 2014 to discuss how to maximize the relationship between the two organizations. At that time, SNA Board passed a resolution that committed SNA to working more closely with SNF.
 - SNF Board of Directors endorsed the SNA resolution at their October 2014 meeting. In addition, the SNF Board reviewed and discussed important elements of the Foundation's governance including new board responsibilities and board structure. In addition, task force of SNF Board members was identified to work on drafting proposed governance changes to bring forth to the entire SNF Board at its spring 2015 meeting. Task Force's first conference call held in December.
 - Per SNA Board's resolution from July 2014, SNF Board submitted report to SNA Board on December 31, 2014 on progress in revising governance.
 - SNF Chair Scott Swogger attending SNA Board's April 2015 meeting. As well as July 2015 SNA Board meeting.
 - Recommending that SNF Chair serve on SNA's Board as an ex-officio, nonvoting member as part of the proposed new SNA Governance Model.
 - SNF Board approved new SNF Board member responsibilities which focus on fundraising and set the expectation that all Board members will be responsible for increasing funding.
 - SNF Board approved a new SNF Board structure which is effective August 1, 2015 and includes:
 - SNA Past President (as recommended by SNA Board in its governance work)
 - SNA Secretary/Treasurer (practice recommended by AND)
 - SNA Professional Development Chair
 - SNA Research Chair
 - SN Practitioner/Operator
 - SN Industry Member (Food or Non-Food) – 2
 - At Large Members – 2 (SN Operator or Industry Members)
 - SNA CEO (nonvoting ex-officio member)
 - At Large Members 5 (perspective from outside SNA)
 3. Review all SNA/SNF Board policies
 - Revised SNA Board of Directors policy manual with draft presented at October 2014 Board meeting. SNA Executive Committee to review and approve the manual at January 2015 meeting.
 - SNF Board policies will be updated when new governance structure is approved.
 4. Evaluate and determine the use of committees and task forces
 5. Refine the role of the House of Delegates in order to focus on the issues of school nutrition programs

6. Reconfigure the SNA Board
7. Evaluate criteria for executive leadership roles
8. Reduce time commitment of volunteers to maximize interest in SNA national leadership opportunities
9. Evaluate and propose a process for identifying, recruiting and developing SNA leaders
10. Review composition and role of nominating committee
 - All of the above strategies will be implemented as a result of the Governance Modeling Summit that will be held January 9 – 10, 2014 to review and identify changes to SNA’s governance. Governance Modeling Summit Report with proposed governance changes will be brought forth to the SNA Board to approve.
 - Contracted with SNA’s Parliamentarian Colette Collier Trohan to complete a full review of SNA’s Bylaws to identify any extraneous information that does not need to be included in Bylaws. **Review completed and report submitted in early April which is in Board book.** In addition, Trohan will be sent the Governance Modeling Summit Report to draft the proposed bylaw amendments required based on the Board’s approved governance changes.
 - Scheduled Resolutions and Bylaws Committee meeting for February Approved governance changes will be given to be brought forth to the House of Delegates for approval in July 2015.
 - **Held a special Executive Committee meeting at SNA headquarters in early February to review the proposed new SNA governance model recommendation from consultants at Tecker International. Committee met and discussed the proposal for two days and then tweaked it to reflect the SNA culture and current political climate. In addition, the Committee voted to call a special meeting of the Board of Directors for February 28 to review the proposed new governance structure.**
 - **Special Board meeting held in Washington, DC to review the proposed new governance structure. The Board voted to approve most of the different governance components, but identified some areas for a Board task force to research and discuss further. Board Task Force work completed and final proposed new SNA governance structure presented to Executive Committee to review and recommend to full Board that will be presented to state leaders at the National Leadership Conference in April.**
 - **Met with parliamentarian, Colette Collier-Trohan, on April 10 to review the draft proposed bylaw amendments. Final proposed bylaw amendments will be presented to the Resolutions and Bylaws Committee via a webinar meeting the week of April 13 that will then be presented to the Board for their approval.**
 - **Presented Proposed New SNA Governance Structure at National Leadership Conference that was very well received.**
 - **Presented Proposed New SNA Governance Structure on SNAC Chat on May XX, 2015**
 - **Worked with parliamentarian Colette Collier-Trohan to finalize reformatted SNA bylaws based on her analysis of SNA’s bylaws as well as the nine required bylaw amendments to support the new governance structure.**
 - **Held webinar on June 16 to present the proposed bylaw amendments to delegates and members.**
 - **Drafted a FAQ on proposed governance structure that has been e-mailed to all delegates and state leaders and posted on the SNA website.**

- Held 2015-16 Planning Meeting with Executive Team to review 2015-16 calendar, state conference requirements and closely review travel priorities for coming year; all in order to reduce the required number of days that volunteer members must be out of the office and make the volunteer experience much more manageable.
11. Identify and prioritize funding opportunities for SNA
 - Business Development staff working group has been tasked with developing and prioritizing a list of current and potential funding opportunities.
 12. Define business plan process to develop and evaluate proposals for new initiatives
 - Created Business Development staff working group to identify business plan process to develop and evaluate proposals for new initiatives. New process to be presented to Board in the spring.
 - Staff Business Development working group met and updated the sponsorship proposal evaluation tool. Tool to be reviewed by the Executive Committee.
 13. Develop an annual process for evaluation of programs
 - First review of programs completed as part of Strategic Realignment Project which resulted in staff recommendations on some programs and services to be sunsetted.
 - Next review will be done Aug/Sept 2015 and results presented at Oct 2015 Board meeting.
 - Executive Committee recommended that annual evaluation process of be scheduled so that any recommendations could be incorporated into annual operating budget.
 - Board identified potential programs to be considered for sunseting at April Board meeting. Staff to review and bring back recommendations to the Board in the fall.
 14. Ensure continuity of SNA representation (single voice/spokespersons)
 - Provided initial media training to the Chief Executive Officer in November.
 15. Redesign orientation for board and committees
 - New Board orientation conducted in July 2014 for SNA and SNF Boards.
 - New Committee orientation held in October 2014 at Fall Committee Days.
 - Identified key NLC 2015 leadership sessions for new 2015-16 Board members to attend. Providing new BOD members with a copy of *The Board* book and ASAE 2015 Volunteer issue of *Association Now* magazine in April at NLC.
 - Updating the SNA Board Orientation presentation to include basic onboarding information on SNA travel policy, expektorations, Board meeting schedule and preparation, etc.
 - Outlined new Board Orientation for 2015-16 Board members to take place in July in Salt Lake City during the incoming Board luncheon on Wednesday, July 15.
 - Introduced new BoardPaq electronic communication application for use in coming year by the Board. The Board will receive paperless Board books for meetings, have access to reference information, communicate with each other, use it for voting, etc. iPads will be provided to Board members who need one to facilitate their use of the new application.