



Strategic Plan Quarterly Report January 2015

1. Education and 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.
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.
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.
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.
 - Enhanced marketing efforts and increased number of members in Certificate program by 229 more members which brings the total back over 20,000.
 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.

7. Study advantages and disadvantages of outsourcing content development
 - Will address once Professional Standards are finalized and released.
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.
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.
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.
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.
 - 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.
 - 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.
 - Increased marketing efforts which have resulted in 65 more members being SNS credentialed compared to last November with 1,344 in total.

13. Provide more scholarships and other ways to reduce the costs of participation in SNA education programs
 - Recommended to SNF Board to use some of its reserves to fund \$25,000 in scholarships this year SNA members to demonstrate that SNF is committed to education school nutrition professionals. 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 an 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.

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 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.
 - 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).
 - Achieved legislative successes for SNA through the FY 15 Omnibus Appropriations 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.
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.
 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.

- Developing a new infographic and other materials to support the 2015 Position Paper, all highlighting these issues.

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.

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.
- Updating 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.

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.

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.
- Drafted story in SNA Magazine on the importance of state advocacy.
- Provided additional research and guidance as needed.
- Developing state summaries of advocacy and policies.
- Continued monthly emails with updates, tips, and summaries of state legislation.

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 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.
13. Develop a plan to increase PAC fundraising
 - Working with PAC Board in outlining plans to expand fundraising efforts at ANC.

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.
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.
 - 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.
4. Clarify the leadership path within SNA to increase national leadership pool
 - Will be addressed after new governance model in place.

5. Develop sponsorship packages to increase revenue and return on investment for industry sponsors
 - Discussing with Industry Advisory Board at January 2014 meeting.
 - Plan to begin implementation in FY 2016-2017
6. Review bylaws to assess relevance of member segments in today's environment
7. Evaluate and prioritize the value of membership for each member segment
8. Create a state affiliation agreement outlining how SNA and state affiliates will support each other
9. Identify and eliminate barriers to participation in SNA
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.
12. Target allied partners that are aligned with SNA programs/priorities
 - Continue to work with the National School Board Association 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.

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.

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.
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.
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. 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 the to be brought forth to the House of Delegates for approval in July 2015.
 11. Identify and prioritize funding opportunities for SNA
 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.

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 at the end of FY 2014-15 with results presented to the Board at October 2015 Board meeting.
- Executive Committee recommended that annual evaluation process of SNA program and services be scheduled so that any recommendations approved by the Board of Directors could be incorporated into annual operating budget.

14. Ensure continuity of SNA representation (single voice/spokesperson)

- 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.
- Identifying webinar on governance for SNA Board members to attend this fiscal year.