



## Strategic Plan Quarterly Report March 2018

Updates in Black = December 2017 Report

Updates in Red = March 2018 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 availability of resources and opportunities to enable members to meet and exceed the USDA Professional Standards regulation, thereby increasing the value of SNA membership to school nutrition professionals.<sup>1</sup>**
4. Increase funding for education and professional development programs.

#### 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:

- Redesign targeted sections of *SchoolNutrition.org* to better present current and planned professional development offerings and related resources. This would include the current Education and Professional Development and Resource and Research sections.
  - A framework has been created that rebrands the Professional Development section to the Learning Center. This includes the Allergy Resource Center launched in July and the new Ethics section launching in January. The new revised center is targeted to launch by ANC18.
- Continue to grow SNA webinar programming by exploring new technologies developed to enhance content delivery, as well as the attendee experience.

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<sup>1</sup> Primary Objective under each Objective is in bold

- Continue to improve the webinars being offered; after a platform review, the current delivery method is more than adequate for SNA's current webinar needs.
- Webinars continue to cover a variety of hot topics. SNA is conducting a "Best of SNIC18" and "Best of LAC18" webinar series featuring some of the best education sessions from both conferences in webinar format.
- Promote the Certificate in School Nutrition and the School Nutrition Specialist Credentialing Programs.
  - The SNS Credentialing Program continues to grow. The November 2017 Credentialing Report shows that we have 1,581 credentialed members which is 44 more than May 2017. This should increase once the fall exams have been scored. The February 2018 Credentialing Report shows the SNS program continues to grow and there is record 1,584 credentialed members.
  - The Certificate program continues to decrease slowly, particularly at Level 1. The November 2017 Certificate report shows we have 18,832 certificate holders, which is 446 less than May 2017 year-end. Hopefully the release of the new Level 2 Certificate will reverse this trend. The Certificate program numbers have held steady over the last few months with the February 2018 Certificate report showing 18,797 certificate holders. The number of members with a Level 3 certificate continues to increase.
- Prepare members for the roll-out of a new Certificate level in July 2018.
  - A roll-out plan is in place and many tools in to prepare members for the release of the new level have been created. Tools are available in several formats at [www.schoolnutrition.org/newlevel](http://www.schoolnutrition.org/newlevel).
- Develop strategies and tools designed to help members build study skills useful for SNS exam preparation and/or in pursuit of higher education goals.
  - Developing a 6-hour live SNS Prep Course that will be piloted at SNIC18. The training will utilize four SNS credentialed subject matter experts in each of the four key areas and will be facilitated by Julie Boettger, PhD, RD. The training includes a heavy emphasis on the key areas and topics covered in the exam along with proven study techniques and resources. The preconference is sold out with 41 people registered. Course will also be offered as a pre-con before LAC.
  - Held two successful pilots of the 7-hour live SNS Prep Course Pre-Con at SNIC18 and LAC18. The SNIC pre-con had 40 registered participants and the LAC18 pre-con had 15 registered participants. Based on feedback and the flow of the course, future registrations will be capped at 20-25. The smaller number of participants allowed for a more engaging class.
  - Beginning to plan development of an online SNS Prep Course as next step to providing this valuable resource to members.
- Explore, test and evaluate various e-learning technologies to assess the best methods to successfully deliver SNA-produced member training offerings. Perform a technology audit of equipment, software and staff resources, using the results to identify opportunities and barriers for the efficient production and delivery of staff-developed training content.
  - Researched various equipment and recommendations made and implemented on the best equipment to support educational and training goals.

- Further research into eLearning authoring tools conducted. Recommended the use of Articulate Storyline for developing training modules.
- **Currently using the Articulate Storyline software.**
- Provide training to Professional Development staff on targeted e-learning authoring tools, such as Articulate and Adobe Creative Suite.
  - The Senior Manager of Professional Development participated in a 15-hour training course on Articulate Storyline. This platform is being used in the development of the online ethics module and the SNS Prep Course learning style assessment.
- Research and compare all aspects (including human and financial resources, database integration and return-on-investment metrics) of a range of options for delivering online training to SNA members, from a vendor-developed Learning Management System package to enhancements that would expand the capacity of SchoolNutrition.org to host and deliver professional development content online.
  - Researched and reviewed various LMS platforms and the resources necessary for implementation and maintenance. Recommendation to not move forward with this option at this time as it's not financially prudent to invest in this platform until SNA has developed more robust offerings.
- Continue to develop a training program on ethics in school nutrition. Explore and expand opportunities for providing a complete course or a stand-alone module as a live, in-person training offering. Expand and evaluate beta testing of an online course and make modifications as necessary based on feedback prior to a national launch.
  - Conducted beta testing in October with nine school nutrition directors participating in the review. The feedback provided in the beta testing has been incorporated into the module.
  - A one-hour self-paced online ethics training course has been developed for launch at SNIC18 in January.
  - **Launched the self-paced online ethics module, "What Should You Do? Ethical Decision-Making in School Nutrition," at SNIC18. The module has been very well received with purchases to date of 71 individual, eight packages of 10, one package of 25, and one package of 50. This equates to 226 individual users.**
  - A four-hour live training offered at ANC as a preconference has been developed and was presented at ANC17 and will be offered at ANC18.
  - **The four-hour ethics pre-con will be a blended learning offering that leverages the ethics online module as the pre-requisite to the live training. Participants will complete the online module on their own. The live session at ANC18 will consist of a review of the concepts learned through the online module and will then focus on the decision-making model through the review of school nutrition case studies.**
  - **Conducting first Blended Learning Pilot in partnership with the Idaho State Agency that has purchased a module package for 50 attendees.**
    - **The pilot consists of the ethics module as pre-requisite to live training.**
    - **Educational content for the live offering at the June 2018 Idaho State Conference will be provided by SNA.**

- In collaboration with the School Nutrition Procurement Ethics Task Force, design a concept for a procurement ethics series that would include case studies with specific answers and guidance.
  - Scheduled a one-hour procurement ethics education session at SNIC18 and LAC18 which will be facilitated by members of SNA's Procurement Ethics Task Force. The session will be case study based using case studies were developed based on input from both the Procurement Ethics Task Force and the Ethics Training Working Group.
  - Conducted one-hour procurement ethics education sessions at SNIC18 and LAC18 that were very successful and well attended. SNA will continue to offer these training sessions at future meetings with the next offering held at NLC 18 and ACDA18.
  - Developed new *Procurement "Do's and Don'ts"* guidelines that will be shared at SNIC18 and during these trainings and as a standalone session at ANC18.
  - Held the *Procurement "Do's and Don'ts"* one-hour training session in March at an SNA conference in Pittsburgh and will be held in April in California. The handouts will also be used by the South Dakota State Agency at an ASBO South Dakota conference in April.
  - Planning the development of a *Procurement "Do's and Don'ts"* online module to further the reach of this educational content.
- Research, evaluate and share best practices in school nutrition ethics.
  - The research conducted has been incorporated into the module and the many case studies.
- Explore how ethics training can be included as part of the SNA Credential or Certificate Program
  - This will be evaluated after the implementation of the new bridge level for the certificate program and the rollout of the ethics online course. Need to make sure we have enough training available before requiring this training for SNA programming.
- Develop leadership training and accompanying tools to help SNA members enhance their skills as leaders in their school districts.
  - Offered a leadership webinar series that included conflict management.
  - Focusing 2018 Georgetown Executive Management series on Emotional Intelligence for leaders.
  - Scheduled a follow-up webinar on Emotional Intelligence with a Georgetown professor in May and open to all members.
  - Scheduled several sessions on leadership for SNA webinar programming and SNIC, LAC and ANC.
- Expand the Virtual Expo to feature additional booths and additional recorded 2017 ANC education sessions.
  - Twenty-two pre-recorded sessions from ANC will be offered between February and April 2018.
  - The 2018 Virtual Expo closed on March 16<sup>th</sup> with some very impressive numbers. Thirty-three (33) virtual exhibitors participated including ACDA, ICN and SNF. A total of 2,127 unique visitors this year compared 1,711 in 2017; total of 2,812 registrants, compared to last year's 2,406; and a total number of 20,845 booth visits in the 6-week timespan.
- Research the feasibility, structure and resources required to develop and deliver a higher-level version of SNA's Industry Boot Camp program for "graduates" of the introductory level.
  - The IAC discussed this at the January meeting during SNIC18 in New Orleans. No definitive curriculum was recommended, beyond adding a section on Procurement

Ethics. Further research is required, including a survey of past attendees and one or two focus groups.

- Provide education to directors/managers on adult learning principles to help them improve professional development practices at the local level.
  - Continuing to do this as part of our regular training.
- Provide education to members who present at SNA meetings and webinars on adult learning principles.
  - Continuing to do this as part of our regular training.
- Promote SNA as the resource for USDA Professional Standards. Prioritize and implement professional development planning.
  - Continuing to do this as part of our regular training.

## 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.<sup>1</sup>**
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 1:

**Increase the recognition of school nutrition programs as integral in the education process.**

### Strategies:

- Update and implement annual SNA Marketing/Public Relations Plan and share with members on SNA website.
  - Continue national-level media outreach to include news and lifestyle magazines and TV shows, syndicated radio programs and top online news sites.
  - Selecting proactive local market media campaigns supporting positive member relations, including SNA marketing campaigns, awards programs and advocacy initiatives.
  - Targeted social media outreach including SNA's *TrayTalk.org* blog and *TrayTalk* Facebook page and blogger engagement campaigns.
  - Implemented annual Back to School campaign that promoted positive messages about the benefits and convenience of healthy school meals through mom blogger outreach, including sponsored back to school posts from all bloggers who participated in ANC17 and cross promotion on SNA's *TrayTalk* Facebook page and blog.

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- Implemented annual National School Lunch Week (NSLW) campaign that promoted hot trends in school cafeterias with the release of SNA's *2017 Trends Report*. National and targeted local media market outreach (in 3-5 markets) will highlight supporting examples from SNA member school meal programs. Social media outreach will include a contest to promote member programs through SNA's *TrayTalk* blog and Facebook page promotions with ads focused on school lunch recipes to tie in with "Recipes for Success" theme.
  - Implemented a New Year's themed campaign promoted tips from school nutrition for getting your kids to eat healthy choices in the New Year. Live in-studio tv interviews with SNA spokespersons were earned in [Las Vegas](#) and [Kansas City](#).
  - Implemented annual National School Breakfast Week (NSBW) campaign to promote the benefits of school breakfast. Campaign included local media outreach in key markets, earning positive in-studio interviews in [San Antonio](#), [Kansas City](#), [Atlanta](#), [Minnesota](#); partnerships with two [mom bloggers](#) to raise awareness about school breakfast with new audiences; three contests and daily posts to drive engagement on the Tray Talk Facebook page; and three new posts on the Tray Talk blog featuring interesting trends in SNA member school breakfast programs.
  - Created *Stop the Block* infographic.
  - Continue to share information on all public relations efforts with members on [schoolnutrition.org](#) and in e-newsletters.
- Continue to develop tools to promote school meal programs as an integral part of instructional intervention in our nation's schools and the professional pride of SNA members.
    - Produced a new video "*SNA Committed to Nutrition*" featuring SNA members and leaders discussing the important role of school meal programs to academic success. Video was promoted to SNA members and sent to members of Congress and their staff.
    - Updated a presentation for SNA leaders to use at state affiliate events on how to promote your school meal program via media outreach.
    - Updated State Advocacy Resource Tools on website to encourage and guide members on how to advocate at the local level.
    - Connected LAC attendees with detailed stats, talking points and a narrative on "The Link between School Breakfast and Academic Performance" via Dr. Keith Ayoob's general session presentation.
    - Developed *Child Nutrition in ESSA* one pager to inform opportunities for including child nutrition programs in state's education improvement plans. The flyer was shared at the Superintendents national conference in February.

**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:**

- Continue to work with SNA members to share their school nutrition "stories" with key stakeholders, identifying potential new avenues and opportunities for facilitating and enhancing such communications.

- Reached an audience of 1.7 million via ANC TV and radio coverage at a publicity value of \$770,812. All stories promoted healthy trends in school cafeterias and featured SNA member local and national spokespersons who were media trained on site.
- Identified and media trained Spanish-speaking SNA members to interview with Telemundo at ANC for a positive school meal story that reached Spanish-speaking audiences in Atlanta and Orlando.
- Worked with four sponsored mom bloggers, pairing them with SNA spokesperson hosts to tour ANC and develop positive back-to-school posts promoting healthy school meals to family audiences.
- Featured success stories from eight different SNA member programs as part of the press release promoting SNA's *2017 Trends Survey*. Local media outreach to promote the featured districts resulted in several stories in Rochester, NY, Detroit and Denver.
- Continued to promote SNA member success stories through the *TrayTalk.org* blog. Launched a NSLW contest to promote and increase followers to the blog. Promoted posts through participation in the KIWI Take Your Parents to Lunch Day Twitter party, adding positive messages about school meals to a conversation that would have otherwise focused on lunch packing.
- Shared positive media coverage and *TrayTalk* posts with the Members of Congress who represent each featured SNA member spokesperson/program, linking to SNA resources such as the Position Paper and Trends Survey.
- Shared footage of key Congressional members and Secretary of Agriculture testifying to the critical nature of school nutrition programs and their trust in school nutrition professionals. Video footage available on the SNA Action Network You Tube channel garnered 5,010 views.
- Promoted the 2018 School Nutrition Heroes, earning positive media coverage telling the stories of all five Heroes, including live in-studio interviews in Memphis and Washington, DC.
- Hosted a media messaging training session at LAC to support six new SNA member spokespersons.
- Since October 2017, SNA has submitted six comments to the Federal Register emphasizing the scope and complexity of school nutrition programs specifically related to Food Crediting, the Interim Final Rule on Whole Grains, Sodium, and Milk and various information collection announcements that may place time and cost burdens on school nutrition professionals.
- SNA continues to encourage SNA members to provide their suggestions for regulatory reform. The comments are consolidated by SNA and submitted to USDA through the Federal Register in "batches". The second batch of comments submitted in November, emphasized the complexity and redundancy in reporting requirements and the impact of Smart Snacks on Fiscal sustainability. A final batch, consolidating all SNA member suggestions provided on the SNA website, will be submitted in July.
- Convened a working group to respond to the Proposed Rule on flexibility in Professional Standards, and a second group to respond to the request for comment on topics to be examined during the development of the 2020-2025 Dietary Guidelines and a third group to respond to the Independent Review of Applications Process.

- Since October of 2017, SNA has taken action on 12 Federal Register notice by either directly responding to USDA as appropriate or notifying SNA members of updates that affect their programs.
  - Met with awardee (2M) of the \$1 million FY17 Appropriations on Program Simplification and identified potential names for interviews with the company. A conference call was held with SNA's immediate past president and current PPL Chair to discuss challenges. The March 2 meeting at FNS HQ was cancelled due to the Federal Government closing, but those invitees have been added to the next meeting which is scheduled for April 9-10. A final meeting is scheduled for April 18.
  - Pending passage of the FY18 Appropriations legislation, \$2 million has been included for "professional associations" to apply to assist in training of school food service professionals. SNA requested this appropriation.
  - Working with House Appropriations Committee, SNA staff is exploring an appropriations request for FY19 which would offer some relaxation of the PLE provision included in HHFKA.
  - Held a luncheon between SNA's Executive Committee, Public Policy and Legislation Committee and USDA Deputy Secretary Steve Censky to discuss Association challenges at LAC 2018. Deputy Secretary Censky also spoke at the closing General Session and announced key changes in hiring flexibilities for professional standards as part of his remarks.
  - Continued discussions on SNA Farm Bill ask for 6 cents in Breakfast Commodities in particular: the offices of Senators Roberts, Hoeven, Stabenow; House offices of Representatives Conaway, Peterson, McGovern, Davis; House and Senate Appropriations; and associations such as American Farm Bureau Federation and United Fresh Produce Association.
  - As a backup plan to the 6 Cents Farm Bill request, SNA Staff has secured a commitment from Representatives Davis (R-IL) and McGovern (D-MA) to seek "at least \$5 million in the FY19 Appropriations to conduct a pilot for Breakfast Commodities.
- Develop and deploy tools for SNA's advocacy efforts to support the fight against block grants and the sustainability of school nutrition programs.
    - Launching the SNA Stop the Block Coalition. Coalition name and fact sheet has been approved; a website is under development; updated logo is being designed; and the coalition member recruitment process has begun. Future efforts include a press plan to officially launch the coalition, online petition and media training for coalition spokespersons. Retained a consultant to assist with the effort.
    - Updated a block grant presentation for SNA leaders to use at state affiliate events to address member confusion over the threat of block grants.
    - Produced and promoted new video (referenced in Objective 1) which featured a discussion on the sustainability of school nutrition programs.
    - Produced and e-mailed an Advocacy Year in Review Report in late November.
    - Released the 2018 Position Paper, with opposition to block grants as priority #1. Provided members talking points, fact sheets and an infographic to support their advocacy efforts. Politico Pro reported "SNA is sending a strong signal that toying with block grants will not go over well with the association of 57,000 school nutrition professionals."

- Hosted the Block Grant Task Force meeting to gather input from a representative group of SNA members on the potential impact of a school meal block grant and strategies for defeating a proposal.
- Announced the SNA Stop the Block Coalition at LAC, with a new logo, video and website landing page. Coalition member recruitment is underway. LAC also featured a general session educating attendees on the dangers of block grants featuring data from an expert panel.
- Created a block grant calculator tool for SNA members to use to calculate and share a detailed breakdown of the impact of block grants on a school district's school nutrition program. Shared with LAC attendees during the Charge the Hill presentation at LAC's 4<sup>th</sup> General Session.
- Results of block grant calculator were shared by SNA members with their legislators to prove loss of funds and potential financial burden on the state.
- Implement a legislative plan that is aligned with current Child Nutrition Reauthorization and Farm Bill Congressional cycles.
  - Plan reviewed by PPL Committee at Committee Days.
  - 4<sup>th</sup> Quarter (October -December 2017) activities have been incorporated into the 5-year Legislative Plan.
- Develop a white paper or brief summarizing the complexity of school nutrition operations with the intent of distributing it, as needed, to key stakeholders for advocacy and outreach.
  - Executive Committee to discuss at January 2018 in-person meeting.
  - Discussion held off considering USDA/FNS Child Nutrition Reducing Burdens Study.
- Disseminate position statements related to various public policy issues, both immediate and enduring, as these are developed and approved by SNA leadership. Update, as appropriate, existing statements. Identify and draft new positions. Identify appropriate communications channels for publicizing SNA positions to provide maximum reach to key stakeholders in school nutrition.
  - SNA Position Statements Task Force met in June 2017 and developed Papers which were reviewed by the PPL Committee at Committee Days. SNA Board will review in early January 2018.
  - SNA Position Statements were approved by the Executive Committee at LAC and will be reviewed by the SNA Board at NLC.

### **Priority Objective 3:**

Increase the number of SNA members trained in advocacy.

### **Strategies:**

- Grow the capacity of SNA's grassroots advocacy efforts to support the Association's legislative and regulatory priorities.
  - Widely distribute action alerts for SNA members to write to their legislators on behalf of breakfast commodities and in opposition to block grants. Since June, an additional 1,646 advocates took action in support of school nutrition programs, totaling 6,098 advocacy outreach activities (5,926 emails to Congress in support of breakfast commodities, 294 emails in opposition to block grants, 6 tweets to legislators, and 7 stories illustrating importance of school nutrition programs.)

- Encouraged SNA members' suggestions for program simplification in response to USDA regulatory reform comment solicitation. Suggestions are used to inform SNA submission to USDA.
- Hosted an advocacy message training session at LAC to support five new SNA member spokespersons for SNA policy-related issues.
- To date, 7,017 advocates have taken action through SNA's Action Network resulting in 25,539 letters to Congress and 500 submissions to the Federal Register in support of SNA's legislative and regulatory priorities.
- Provided a webinar titled, "Advocacy in 2018: Prepare to Charge the Hill" prior to LAC to provide background and supporting points for the recently released 2018 Position Paper, and tips for advocating.
- Develop and deploy tools for state affiliates to enhance their advocacy efforts in support of national and state legislative/regulatory priorities.
  - Produced a new advocacy video (referenced in Objective 1) and promoted it to affiliates with instructions on how to download and disseminate this tool for use in their own advocacy outreach.
  - Added state advocacy resources to the State Support Center including #StoptheBlock PowerPoint, Advocacy Elevator Speech, Whole Grains and Sodium media talking points, tips for writing a state association position paper and hiring a lobbyist, and state specific ethics and lobbying laws.
  - Developed state resolutions templates in opposition of block grants and in support of recognition of the role of school nutrition professionals to be used in state affiliate lobbying efforts.
  - Updated unpaid meal charge talking points, developed a template letter to legislators and supported several state affiliates in developing a response to "lunch shaming" legislation.
  - Shared SNA's #StoptheBlock: Save School Meals education session proposal and resources for state affiliates to submit to their local allied conference request for proposals.
  - Continue to monitor and alert state affiliates as state legislatures introduce local legislation that impacts school meal programs.
  - Provided new Block Grant and Cafeteria Site Visit presentations to the Public Policy and Legislation Chair to be presented at state affiliate conferences. The presentations were also made available on SNA's website.
- Explore the mobile capabilities of SNA's current online Legislative Action Center and the SNA Action Network and investigate the pros and cons of developing a mobile app for the annual Legislative Action Conference, as well as advocacy efforts throughout the year.
  - Developing LAC Mobile app that will premiere at LAC 2018.
  - LAC mobile app was developed and launched at the conference. In addition to conference resources, the app provided easy access to Feedback Forms and legislator bio's and contact information.

### 3. Community

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

#### Objectives:

1. Increase individual and School District Owned Memberships and membership retention.
2. **Increase satisfaction and engagement among different demographic segments of SNA's membership.**<sup>1</sup>
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 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.
  - Apply initial research results to define key demographic segments and begin the development of targeted tools and approaches to meet their needs.
    - Using the data from the Membership Satisfaction research conducted in Spring 2017, created membership profiles to help SNA leaders and staff better understand SNA members priorities and interests in order to provide more targeted services and resources.
  - Apply initial research results from the state agency/state association survey to expand opportunities for state agency/state association collaborations.
- Continue the work that began with the Young Professionals (YP) Task Force to enhance engagement with this important member segment.
  - The YP Task Force has been very active, and helped review new digital tools aimed at this segment.
  - A Task Force member, along with SNA staff also took part in a Millennial Roundtable discussion with other Associations on Wednesday, October 25, 2017.
  - **Renamed the Young Professionals Task Force to the Next Gen Professional Task Force in order to engage all emerging professionals in the school nutrition industry whether they are young or older professionals now working in the school nutrition industry.**
  - **Held the Next Gen Professionals Task Force meeting in Alexandria, VA, February 7-8, 2018. Task Force created a mission statement and identified new ideas to increase engagement of the Next Gen Professionals in school nutrition profession. Many activities planned for 2018 ANC included a Next Gen Professionals lounge to increase engagement with this important member segment.**

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<sup>1</sup> Primary Objective under each Objective is in bold

- Continue the work that began with the Chefs Task Force to enhance engagement with this member segment and provide culinary training and resources for SNA members.
  - Scheduled the following education sessions at ANC2018:
    - 4-hour Pre-con – Culinary Knife Skills
    - 2 Culinary Skills Lab Education Sessions
    - Additional pre-con tour of Mandalay Bay Hotel kitchen and Culinary Food Trends session
- Explore opportunities to enhance content on *SchoolNutrition.org* and its social media channels with the strategic application of new engagement technologies, such as instant polls/surveys.
- Conduct qualitative research with SNA non-members to identify barriers to joining SNA and use this information for future outreach/communication of membership benefits.

#### **Priority Objective 4:**

Enhance the SNA and state affiliate partnership to align efforts to achieve SNA strategic goals.

#### **Strategies:**

- Continue to roll out State Affiliation Agreement in a mutually beneficial way for the state affiliates and national association.
  - To date, 27 state affiliates have signed the affiliation agreement.
  - Continuing to work with other states and answer their questions.
  - As of March 29, 36 state affiliates have signed the affiliation agreement; new affiliation certificate created and is being signed and sent to states as agreements and all required paperwork is sent into SNA.
- Develop tools and resources for state affiliate leaders to better understand the value of State Affiliation Agreements and prepare talking points to facilitate discussions of State Affiliation Agreements with state boards.
  - Posted tools and resources on the State Affiliate Resource page.
  - Worked with SNA parliamentarian to develop a state bylaws checklist to help states ensure that their bylaws are not in conflict with SNAs.
- Create an annual orientation program for state leaders to educate them on the support and resources SNA provides to state affiliates as part of State Affiliation Agreements.
  - Scheduled and held first orientation session for Tuesday, January 9, 2018 with state leaders.

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

Enhance strategic partnerships with allied organizations.

#### **Strategies:**

- Identify synergies between SNA and allied groups in pursuit of issues of mutual benefit and concern.
  - Participated in the National Farm to School Network's Farm to School Month, submitting SNA President Lynn Harvey's [blog post](#) tied to NSLW and cross promoting the celebration through SNA's social media channels.
  - Partnered with US Apple Association in Apples4Ed campaign.

- SNA President presented at the Superintendents national conference and shared the critical nature of school meal programs and the potential impact of a school meal block grant. Also shared information on opportunities and benefits of including school meal programs in state ESSA plans.
- SNA arranged to exhibit and present an education session at the National School Boards Association national conference in April.
- Continue to explore new opportunities to engage with allied partners.
  - Attended Every Kid Healthy Coalition one-day meeting in late October where the Whole School Whole Community Whole Child model was the major focus; coalition adopting the model and beginning to work together on a program to promote to more school districts.
  - Attended the National Anti-Hunger Policy Conference and participated in round table discussions regarding including child nutrition policy in state ESSA plans and the current state of unpaid meal policies.

### **Membership – Getting to 60,000 Members Campaign**

- SNA currently has 58,243 members nationwide (which is 242 more than May 2017 year-end). Overall, membership remains at its highest in over a decade and SNA is in a good position to reach 60,000 national members by December 2018. *As of February 2018, SNA has 58,289 members. If trends follow normal patterns, membership should increase as we approach May 2018 (membership year-end).*
- SNA has developed a comprehensive plan with several strategies to reach 60,000 members.
  - This included identifying “Membership Champions” for each state and providing them all data and tools to enables them to recruit and retain members at a state and nation level. A fun button (including a digital version) button has been created. SNA currently has 77 Membership Champions from 34 states. *SNA now has 81 Membership Champions from 36 states.*
  - Developed and shared with the state affiliates targeted recruitment plans that identify non-member school districts; and school districts not using the SDM option.
  - Conducting conference calls to review school district recruitment plans. *SNA has completed calls with most states and has developed a communications schedule to help highlight and share recruitment tools, tips and best practices with states.*
  - In addition to partnering with the Membership Champions, SNA continues to implement strategies on the plan including:
    - Broad outreach to non-member directors in the top 1,000 school districts
    - Activating the Next Gen Professional Taskforce to assist with recruiting new members
    - Reaching out to State Agency non-members with membership and professional development messaging
- School District Owned Membership currently accounts for 54.6% of total membership and this program is a major mechanism for helping increase membership. *SDM continues to grow and as of February 2018 accounts for 56.1% of total membership.*

## 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.<sup>1</sup>**
- 4. Increase funding and resources to high priorities of the strategic plan.**

### Priority 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.
  - **Future Leader Program graduates will be invited to speak with the Future Leaders in the 2018 program at NLC this year to share their leadership journey.**
  - **Interest in the Future Leaders program is much higher this year for the 2018 program at NLC than in past years with 56 participants preregistered.**
- Continue to improve and promote current leadership advancement opportunities, especially among underrepresented demographic segments.
  - The Leadership Development Committee led the nominations process for the 2018 election, beginning with the Call for Nominations at ANC in July. The committee met at Fall Committee Days in October to review potential candidates and deliberate on their leadership experience and competencies. The slate for the election was selected, the nominees notified and the announcement made by blast email and on the website in late October.
  - There will be representatives from the Leadership Development Committee at 2018 national leadership meetings. They will be wearing Talent Scout buttons and engaging members about their leadership journey and encouraging them to consider national leadership opportunities. The Chair and the Vice Chair are representing the committee at SNIC as Talent Scouts and are also attending the Strategic Planning Committee meeting.
  - Campaigns by ballot candidates on the 2018 election slate are underway. The election will be held February 15-28, 2018.
  - **The Leadership Development Committee was represented by Judy White at LAC. Chair Becky Domokos-Bays and committee member Micheline Piekarski were also doing talent scout work at the conference.**

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<sup>1</sup> Primary Objective under each Objective is in bold

- The process for committee appointments this year by the President-elect is underway and is focused on ensuring the committees are more diverse wherever qualified members can be matched with openings.
- Continue to tie the recruitment for committee appointments and the nominations process for elected positions more closely to create more engagement and SNA experience opportunities for potential candidates.
  - The Leadership Development Committee is continuously following up with members they have met and discussed leadership opportunities with by phone and at meetings. Those contacts are recorded in the committee's Prospect Log. The goal is to provide the President-elect with the names of members who have expressed an interest in serving on an SNA committee and to help facilitate filling appointments.
  - While the 2017 ballot was one of the most diverse ballots in recent SNA history, the voting results produced a less diverse outcome.
  - The 2017-18 Leadership Development Committee has two male members, two minorities, an employee/manager, and a state agency member. The latter two, elected to represent their region, have usually not been represented on the committee but have brought helpful perspectives to the nominations process this year.
  - Created SNA leaders section on SNA website that includes photos of SNA committee and council members and eventually state leaders so SNA members can see and know their state and national leaders to promote these important and valuable positions.
  - The new members of the Leadership Development Committee elected in the February 2018 election were provided with an orientation to the committee and the nominations and election processes. They were provided with Prospect Log and encouraged to start work on staying in touch with members in their regions who have expressed interest in committee appointments and elected positions.

#### **Priority 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 2017-18 priorities, including the sun-setting of programs as appropriate.
  - Developed a comprehensive plan to support the *Getting to 60,000 Members* campaign which included projected new membership revenue that would be realized by the increase in members as well as new recruitment strategies that SNA could implement if new staff position was added to support effort. Board approved in August 2017. Reallocated funding in SNA annual operating budget to create a new position in the Membership and Professional Development center to support all the new Professional Development initiatives underway.
  - Staff vacancies were all filled by March 15, except two positions on hold being reviewed for support to the new 2018-21 Strategic Plan after it is approved. Since March 15, two vacancies have occurred and both are under active recruitment with phone and in person interviews underway.

- Identify and prioritize new funding opportunities for SNA.
  - Reconfigured the ANC2018 exhibit floor by moving Culinary Demos, and reconfiguring some of the aisles on the floor which has resulted in an increase of 50 more booths and approximately \$125,000 in new revenue.

## 5. School Nutrition Foundation

### General

The SNF Board approved the updated SNF Transformation Plan and SNF continues to move forward toward the goal of creating financial sustainability for the Foundation and for creating value for SNA members and the school nutrition community.

- Board elected two new board members, Suzanne Morales (CA), and Jill Kidd (CO). These board members filled the positions designated for an SNA member with expertise in professional development (Morales) and research (Kidd)
- Held annual in-person meeting on October 5 – 6, 2017 in Crystal City, VA.
  - Conducted a Mega Issue discussion “How Can SNF Provide Value to SNA Members and Other Stakeholders?” which resulted in setting strategic focus areas of innovation, research, program sustainability, and nutrition literacy.
  - Approved the 2017-2018 budget and the allocation of \$ 91,673.44 for Invest In Us activities for FY 17-18.
- Following the board meeting, the Board members approved three additional actions: Approval of new committee members for Audit, Nominations, Hero Selection, Hero Steering and Scholarship Review; Approval of an expanded charter for the Nominations Committee; Approval of allocation of funds to subscribe to a more robust fundraising platform.
- Held SNF Board meeting via conference call on March 23, 2018 and discussed future board recruitment.

### Projects:

- **Breakfast in the Classroom, Cycle 4**
  - Team is working to recruit additional districts in 10 target states of Idaho, Louisiana, Mississippi, Missouri, Nebraska, North Carolina, Ohio, Oklahoma, Texas, Utah.
  - All agreements with the 10 state affiliates to work with SNF/SNA to promote program. Initial payments to all states have been made.
  - Team attended conferences and/or BIC planning sessions in Raleigh, NC, Lincoln, NE, Missouri SNA, Mississippi SNA, Salt Lake City, UT.
  - Eight signed MOUs- Jennings, MO; Austin, TX; St. Helena, LA; Grand Island, NE; Livingston, LA; Hayti, MO; Houston, MS; Moss Point, MS; Indian Creek, OH
  - Five MOUs in progress and 12 additional districts are planning to apply.
  - On track to have ALL grant funding allocated by end of grant period.
  - Conducted BIC session at SNIC with Industry and Operators – topic was focused on solutions to barriers to implementation.
  - Received 3 MOUs for cycle 4 applications circulating, and several applications in varying states of submission. Currently we have 13 awarded districts finalized.
  - Team travelled to OKC in early February to assist with applications.

- **Cycle 3**
  - Began planning and outreach to districts with remaining balances.
  - Conducted a survey for Cycle 1-3 districts to touch base and glean ideas for future technical assistance and granting plans.
- **Schools as Nutrition Hubs (SANH):** Working on Phase II of collaboration with Share Our Strength to create tools to assist directors in determining capacity and capability to expand meal programs.
  - SOS (NKH) is developing a facilitator’s guide to present the information
  - Planning on where to deliver content is underway.
  - Planning to pilot the education sessions around these tools in West Virginia (April) and Colorado (June 12) and Georgia (Fall)
  - SNF is working with SOS/NKH to develop the final presentations which will be delivered by Helen Phillips and Marla Caplan.
  - SNF is working on a Phase 3 proposal with SOS/NKH to evaluate and update the tools.
- **Scholarships**
  - SNIC scholarship recipients have been selected (43 completed applications were received out of 86 applications started)
  - Winston Equipment Grant application opened on December 1, 2017.
  - LAC scholarships opened on November 22; ANC opened on December 1, 2017.
  - Eight complete submissions were received for the Josephine Martin LAC Fellowship (out of 40 applications were started)
  - **Winston** – received 22 completed applications. Another 26 applications were started, but not completed. Winner will be announced at the end of March
  - **LAC** – received 15 applications for 6 scholarships. Winners were from NY, CT, NC, MA, IA, and ID.
  - **ANC** – received 57 applications for 10 scholarships. Winners will be announced at the end of March.
- **New Walmart Funding**
  - Piloting projects in two school districts (Siloam Springs, AR and Houston, GA) to increase paid (non-universal) breakfast in the classroom programs. SNF will regrant about \$90,000 to implement programs.
  - SNF team conducting initial meetings with district stakeholders in March and April.

**Fundraising/Development:**

**Donations**

	Friends/Annual Fund Contributions	Patrons	Scholarships	Celebration of School Nutrition Heroes	Total
Aug 1, 2016– Mar 12, 2017	\$30,367	\$126,000	\$31,032	\$205,250	\$392,649
Aug 1, 2017 –Mar 12, 2018	\$26,710	\$135,000	\$38,220	\$166,389	\$366,319
<b>% Increase/Decrease</b>	-13%	7.1%	23%	-19%	%-7

***Transformation Plan goal is to raise \$65,000 for the Annual fund by end of the 2018 calendar year.***

### **SNF State Ambassadors/Annual Fund/State Incentive**

To date, there are 47 active SNF State Ambassadors. Each year, SNF offers an incentive to states who have 3% or 5% of their state membership donate to the Foundation. If they meet these goals, the states receive a percentage of all money raised for state scholarships. We have eight states who have already met or exceeded the 3% goal – MT, NE, WV, MA, KS, KY, AZ, MS. Two more states are close to achieving the goal – NY and SD.

***The goal is to have 30% of states reach the goal – we anticipate by the end of the 2017 calendar year, we will reach 20%***

- Eleven states (23%) met the 3% or 5% goal of membership giving and SNF will award a total of \$2775 to state associations.
- Met with 8 state ambassadors at SNIC. Working to implement suggestions including:
  - Simplifying application process
  - Recommending possible changes to professional development scholarships to allow for non-degree related courses
  - Increasing communication with state presidents to provide more visibility for Foundation at state conferences.
  - Developing additional resources for Ambassadors

### **Sustainer's Circle**

- Twelve donors are making monthly recurring donations.

*The goal this year is to have 27 donors make recurring donations.*

### **Committee Days**

Fifty-eight (58) of 67 members attending made donations to the Foundation totaling \$2748. This compares to 62 donors in 2016 contributing \$3800.

### **Celebration of School Nutrition Heroes**

The SNF Heroes Selection Committee reviewed the 37 nominations received. The five 2018 SNF Heroes will be announced in early January. SNF is actively been seeking a Premier Sponsor. SNF has received verbal commitments from all Leader Sponsors from last year. Following the holidays, SNF will be working to finalize other sponsors and event details.

- Nine Leader sponsors (\$10,000)
- Seven Champion sponsors (\$5000)
- Six Supporter sponsors (\$3000)
- Eight Table purchases (\$2500/\$1500)
- Sixty-four individual ticket purchases
- Attendance – 280 (waiting for final)

### **Giving Tuesday**

SNF's goal this year is \$7000, using a new fundraising platform. Implemented a new social media campaign that engages state ambassadors, past donors, and identified influencers. AccuTemp donated \$20 for each new donor of \$10 and challenged other companies to do the same.

- Giving Tuesday donations totaled \$8634.40. \$1300 was raised through individual Facebook fundraising campaigns.

### New Projects/Initiatives

- Submitted two proposals in this quarter:
  - 1) Walmart Foundation for a pilot of Breakfast in the Classroom in non-universal districts (\$126,000) Funded
  - 2) ASAE Innovation Grant for Ideas@Work (\$10,000) **Not funded**
 Expect to hear about both grants in January 2018
- In November and December 2017, conducted a direct mail fundraising campaign targeting 4000 SNA members who are Directors. The first letters arrived in mailboxes the week of November 12, 2017. **This campaign yielded two donations. We plan to repeat this in mid-April to the same group of directors via email.**
- Working on a project to increase donations from Corporate Industry (non-Patrons) by creating two giving levels with corresponding benefits. Expect to launch this in Q2. **This will go out in mid-April.**
- #Showmeyourinnovation is a social media campaign that will launch in January with the support of the SNA YP Task Force. The goal is to have members post short videos/photos of innovation in their cafeteria and then challenge others to do the same and/or donate to SNF.
  - **Results were shared with the Next Gen Professional Task Force at February meeting. Influencers promoting #shareyourinnovation: Horizon Software, Nutrislice, Dayle Hayes, SNA, Beyond Breakfast**
    - **Twitter – 5 videos tagged with #shareyourinnovation. More than 2000 views for all videos.**
    - **Twitter – More than 36 posts with #shareyourinnovation**
    - **Facebook – 42 posts, videos viewed more than 5,550 times, 67 photos**
    - **Instagram – 121 likes, 40 posts**
- Ideas@work is a collaboration between SNF and SNA to foster the sharing and implementing of innovative ideas that will increase school meal participation. This project will launch at SNIC with 5- 30-minute sessions that will be repeated. We will create additional materials include short videos featuring the presenter, and ‘recipes’ for how to implement the innovation.
  - **Successful sessions at SNIC. Captured video content that we are editing for short video content to be posted on web and social channels.**