



**Leadership**  
Development

# NEA LEADERSHIP COMPETENCY GUIDE



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## National Education Association

The National Education Association is the nation's largest professional employee organization, representing over 3 million elementary and secondary teachers, higher education faculty, education support professionals, school administrators, retired educators, and students preparing to become teachers.

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# NEA Leadership Competency Guide

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# Vision, Mission and Values

Adopted at the 2006 NEA Representative Assembly

## The National Education Association

We, the members of the National Education Association of the United States, are the voice of education professionals. Our work is fundamental to the nation, and we accept the profound trust placed in us.

### Our Vision

Our vision is a great public school for every student.

### Our Mission

Our mission is to advocate for education professionals and to unite our members and the nation to fulfill the promise of public education to prepare every student to succeed in a diverse and interdependent world.

### Our Core Values

These principles guide our work and define our mission:

**Equal Opportunity.** We believe public education is the gateway to opportunity. All students have the human and civil right to a quality public education that develops their potential, independence, and character.

**A Just Society.** We believe public education is vital to building respect for the worth, dignity, and equality of every individual in our diverse society.

**Democracy.** We believe public education is the cornerstone of our republic. Public education provides individuals with the skills to be involved, informed, and engaged in our representative democracy.

**Professionalism.** We believe that the expertise and judgment of education professionals are critical to student success. We maintain the highest professional standards, and we expect the status, compensation, and respect due all professionals.

**Partnership.** We believe partnerships with parents, families, communities, and other stakeholders are essential to quality public education and student success.

**Collective Action.** We believe individuals are strengthened when they work together for the common good. As education professionals, we improve both our professional status and the quality of public education when we unite and advocate collectively.

## The Need for a Distinctive Leadership Brand

As public education continues to transform, so will the role of educators. The National Education Association (NEA) recognizes that education leaders are making, and will face, some of the toughest decisions in the history of our Association and public education. The Association must continue to strategically use its resources to invest in educators by providing opportunities that increase their awareness and understanding of their role as leaders. Educators who see themselves as leaders, whether in their Association or profession, are a necessity. Further, NEA believes that investing in the development of great leaders is a powerful and essential investment.

Recognizing the need and the urgency, NEA engaged leaders across the Association to discuss the current and desired future state of NEA's leadership development. NEA also established a leadership development advisory team, consisting of governance, members, and staff, to review member input and ideas across the NEA and to develop a common vision for what NEA leaders should know and be able to do. It is out of this work that the NEA Leadership Competencies were born.

Revised in 2017-18, the current NEA Leadership Competency framework seeks to describe the 'NEA leader' of the 21st century. These competencies, updated by practitioners and staff, offer a more unified and interdisciplinary approach to leadership development, with particular attention on expanding the competencies to include skills that can position educators to address systemic problems, like institutional racism. In fact, some of the revisions explicitly reference the intersection of race, social justice, and policies and practices, on students and public education. Other times, you will notice that the knowledge, skills, and abilities listed in a competency include developing the leaders' ability to apply their knowledge of these intersections to assess current, public practices and policies, as well as organizational practices, and their impact on equity. NEA believes that these conversations and skills are paramount and necessary for every educator.

Every aspect of the Association plays some role in leadership development, making it even more important to have a common vision

and understanding of what we are collectively working toward. That common vision is establishing a distinctive leadership brand that is defined by the NEA Leadership Competency framework. No longer are educators left to wonder what it takes to be a leader.

## Purpose

The framework is based on a belief that educators are leaders. A second belief is that educators need a unique set of leadership competencies that will assist them in multiple areas, but specifically in leading their Associations and in their professions. With this framework, NEA has defined what it means to be a "NEA leader" through the development of a series of six leadership competency domains. While NEA continues to invest in specialized leadership development opportunities for specific membership categories and roles, these leadership competencies are intended for the benefit of all current and emerging leaders, regardless of role, level, or experience. The competencies are designed to prepare NEA members to **lead relevant, thriving Associations and become world-class education leaders in their professions.** The competency domains are interconnected. Together, the competency domains present a well-rounded picture of the knowledge, skills, and abilities NEA believes equips educators to lead and create the systemic change in public education.

## The Promise of Leadership

When the NEA Leadership Competency framework was created, leadership development was viewed as being part of individual programs or as a conference or event. Leadership was also used to describe only those individuals who held an elected position in the Association. Since the initial development of the framework, those views have changed and continue to change. Leadership development is viewed not only as an organizational priority, it is becoming widely understood that it is an essential component of enhancing organizational capacity and necessary for any educator who desires to be an exceptional practitioner.

As such, leadership development is not the responsibility of a singular department or program, but is something that must be understood, prioritized, and viewed similarly throughout the NEA enterprise.

Leadership development at NEA is now evolving to have its own language and standards, its own following, and brand. More and more, leadership development is being defined as a journey, not as episodic events. More importantly, the definition of leadership is expanding and changing. Leadership is no longer necessarily defined by an elected role or position, but by key characteristics, actions and influences used to lead within and beyond the Association and in the education profession.

The catalyst for this change is a new set of NEA leadership competencies that encourage and support the leadership of self, the leadership of others, and the leadership of the Association.

### **Leadership of Self (*Foundational*)**

The value and need for personal growth and development is important as you think of your leadership journey. Every one of us has a compelling leadership journey. We have all made choices that have shaped our life's path including: how we respond to success and failure, whether or not to take on leadership roles, and ability or inability to take risks. We all have stories and experiences that have shaped our leadership journey.

As you lead yourself – you should consider self-reflection, evolution and responsibility as a means to regularly check-in with yourself to monitor your motives for leading. You should engage in activities that help to grow and refine your leadership acumen and abilities. In addition, you must have a willingness to act and conduct yourself and the business of the Association with integrity and character.

### **Leadership of Others (*Mobilizing and Power Building*)**

A critical part of unleashing your own leadership potential is the ability to unleash the leadership potential in others. A leader demonstrates attributes and behaviors that capture the hearts and minds of people and inspire them to follow and to lead. Leading others enables us to activate our leadership capacity. Leading others is a way to demonstrate our shared values, experiences, and *why* we do *what* we do.

Understanding that no one gets here alone, it is important that you develop and work with others in order to reproduce leadership. Leaders help others to grow as they inspire and equip them to lead in

their everyday lives. Leaders foster the need for respectful and collegial relationships within and outside of the NEA and mentor current and aspiring leaders so that they, in turn, can go on to be leaders.

### **Leadership of the Organization (*Agenda Driving*)**

How do we transform the present Association into one that is prepared to handle the successes and challenges we face now and in the future? What are the critical systems that must be developed?

In order to address these critical questions and others, the Association requires agenda-driving leaders. Their actions and those they lead are driven by the Association's mission, vision, and core values. Agenda-driving leaders create and monitor internal systems, structures and processes that enhance organizational capacity. They lead themselves and others to develop strategy and take ownership for identifying, addressing, and creating solutions to systemic problems. Agenda-driving leaders understand transformational change, within the organization and within the context of broader systems.

## **The NEA Leadership Competency Framework Explained**

The leadership development competency framework reflects the NEA strategic framework and was developed through multiple leader and member engagements, interviews, focus groups, and a review of benchmark models in union, public sector and corporate environments. These competencies define for our Association what leaders should know and be able to do in the domains of advocacy, communications, governance and leadership, organizing, professional practice, and strategy and fiscal health. Leadership development is not a linear process. As such, it is quite possible for an educator to be *Foundational* in one competency and *Agenda-Driving* in another. Likewise, members may focus on one competency and achieve modest growth before switching to focus on another competency. The key is that members are aware of their level of competency and have a plan for strengthening their leadership, with an eye toward learning how to effectively lead others and the Association. This is the power and usefulness of this framework.

The framework has the following essential elements.

- ★ **Six Competency Domains:** the core functions of the Association that support professional practice. Each competency has a definition that explains the overarching purpose, goal and objectives of the competency.
- ★ **Key Themes:** under each competency there are multiple themes that convey the topic areas the competency addresses.
- ★ **Proficiency Progression:** *(labels adapted from language shared by the AFL-CIO):* progressions convey a brief profile of the leader and their capabilities as they grow. They include Foundational (leading of self), Mobilizing and Power-Building (leading others) and Agenda-Driving (leading the organization).
- ★ **Behaviors:** how leaders demonstrate the competency at increasing levels of proficiency.
- ★ **Essential Program/Training Considerations:** not intended to be exhaustive or prescriptive, but provide a suggested approach, and in some cases, examples of what could be included in a training or program to help members develop the knowledge, skills, and abilities as outlined in the progression level.

## Ideas for Using the Leadership Competencies

The competencies are a vehicle to support continuous learning and are intended to be broadly applicable across the organization for individuals, locals, affiliates, and NEA. The competencies are very robust and are not meant to be completed over the course of a single event or a single year. **The competencies support the notion that leadership development is a journey, not an event.** The competencies serve as a guide and a tool to show what Association leaders should know and be able to do over the course of their careers in order to lead thriving, relevant organizations and to lead in their professions.

Below are some activities that may be considered across the NEA enterprise and at all levels.

- ★ Endorse, adopt or customize the NEA Leadership Competency framework to create or enhance state and local leadership development systems and programs. Help bring a greater alignment of leadership development goals across the enterprise.
- ★ Assess your leadership proficiency across competencies at many points throughout your leadership journey. NEA has developed self-assessments, which can be accessed, along with other resources at [www.nea.org/leadershipdevelopment](http://www.nea.org/leadershipdevelopment).
- ★ Develop a plan for your leadership development, see Leadership Development Guide template on page 23.
- ★ Seek out leadership opportunities within your profession that allow you to exercise the competencies.
- ★ Identify knowledge, skills and attributes (abilities) needed for a particular leadership role or assignment. Consider questions such as:
  - What leadership strengths can I build on through the competencies?
  - What leadership challenges can I improve through the competencies?

## Where To Turn for Leadership Development Resources

[www.nea.org/leadershipdevelopment](http://www.nea.org/leadershipdevelopment)

Log on and find resources and programs through the leadership development resources site to access these and other resources to support you in your leadership journey.

### Leadership Competency Self-Assessment(s)

The NEA Leadership Competency Self-Assessments were designed to help NEA leaders identify their own areas of strength, as well as areas where they can improve. Individuals are strongly encouraged to engage the self-assessments as often as they like or need to identify the areas in which they want to grow.

### NEA National Leadership Summit

The National Leadership Summit is NEA's premier leadership experience. It is designed to challenge your thinking, your method of doing business, and deepen your understanding of ways to enhance your individual and organizational capacity. The goal is to create an experience that deepens your understanding of what the NEA believes are the knowledge, skills and abilities every educator needs to lead with vision, purpose, and action.

### Personal Leadership Development Guide (*Template*)

The Personal Leadership Development Guide (Template) is intended for individual educators who are curious about their leadership and are ready to start their journey toward self-awareness to become stronger Association leaders (elected and non-elected) and stronger professionals.

## Teacher Leadership Competencies

The NEA Teacher Leadership competencies, developed for the Teacher Leadership Institute, are a resource for identification, reflection, guidance, and inspiration for classroom practitioners. The NEA Leadership Competency Framework was used in the development of these competencies which can be used as guideposts for professional growth.

### Education Support Professional (ESP) Professional Growth Continuum

The PGC serves as a 'map' of how Education Support Professionals (ESP) can grow professionally, by bridging the gap between current practice and a vision for a system of support that recognizes ESP as vital partners in student success. The NEA Leadership Competency Framework serves as a foundation for, and aligns with, the PGC to define for ESP the competencies they need to begin to accelerate their professional growth.





# Leadership Competencies



## ADVOCACY

Advances the cause of public education through social justice and how it benefits our students and members' professional needs and rights.



## COMMUNICATION

Builds an integrated communications strategy that drives the goals of our professions.



## GOVERNANCE AND LEADERSHIP

Sets the mission and establishes strategies necessary for a relevant and thriving organization; empowers, motivates, and fosters a pipeline of talent for the future.



## LEADING OUR PROFESSIONS

Advocates for quality inside our professions and promotes our union's role in advancing education transformation and student learning.



## ORGANIZING

Mobilizes to influence successful organizing outcomes, strengthen internal and external relationships, and membership capacity; recruit and identify new members and potential leaders into the Association.



## STRATEGY AND FISCAL HEALTH

Builds the brand and accomplishes the goals of the Association through effective financial management and understanding of fiduciary responsibilities.

## Chart Tables Explained

# LEADING OUR PROFESSIONS

COMPETENCY DOMAIN TITLE

DEFINITION

Advocates for professional learning, professional quality and social diversity inside our professions and promotes our union's role in advancing education transformation, student learning, and equitable access to opportunities.

PROGRESSION

Competency Theme	Level 1: Foundational	Level 2: Mobilizing and Power Building	Level 3: Agenda Driving
Supports professional excellence and builds capacity for continual improvement and learning to ensure the success of all students	<p>Understands the value of continuous improvement and learning for all educators across their career continuum and what this looks like in practice</p> <p><b>THEME</b></p> <p>Develops an understanding of the career continuums for ESP and teachers, with a focus on the role of professional learning and reflective practice (e.g. learning cycles) and supports in moving along each continuum and growth</p>	<p>Engages with others in meaningful development and models for continuous improvement and learning for all educators across their career continuum</p> <p><b>Training Considerations</b></p> <p>Understands strategies to lead others in best practices in professional learning and support, such as adult learning theory, models that are effective in professional learning, and ways to ensure that professional learning is embedded in and informed by context. Learns how to use strategies to engage others in securing high-quality professional learning opportunities and</p>	<p>Builds and sustains an organizational culture of professionalism and reflective practice that illustrates the professions' commitment to continuous improvement and learning for all educators across their professional continuums</p> <p><b>Training Considerations</b></p> <p>Utilizes system-level strategies (e.g. improvement science, labor/management collaboration) to create cultures of professionalism and reflective practice in support of student learning and growth</p>
Recognizes and promotes the Association's role in improving the learning of all students	<p>Understands the current and evolving needs of all students, educators and schools</p> <p><b>Training Considerations</b></p> <p>Individuals develop an awareness and understanding of how the Association leverages its strengths by identifying student needs in their worksites and implementing member-led solutions to meet those needs</p> <p><b>PROGRAM TRAINING COMPONENTS</b></p>	<p>Engages all leaders and members and motivates members from diverse backgrounds to advocate for a meaningful Association role in ensuring the success of all students, educators, schools, and campuses</p> <p><b>Training Considerations</b></p> <p>Understands how to help and support others identify student needs in their worksites and collectively implement member- and Association-led solutions to meet those needs</p>	<p>Elevates the Association's role by developing members' leadership capacity and collaborating with innovative allies to ensure the success of all students, educators, schools, and campuses</p> <p><b>Training Considerations</b></p> <p>Leads the process of developing and using models and strategies across systems (e.g. labor/management collaboration, partnership and community engagement) to enhance the Association's ability to drive the success of P-20 education systems</p> <p><b>BEHAVIORS</b></p>

# ADVOCACY



Advances the cause of public education through advocacy for students including addressing racial and social justice in education and how it benefits our students and members' professional needs and rights<sup>1</sup>.

Competency Theme	Level 1: Foundational	Level 2: Mobilizing and Power Building	Level 3: Agenda Driving
Utilizes best practices in advocacy and political efforts	<p>Identifies and discusses fundamentals of advocacy practice and theory</p> <p><b>Training Considerations</b> Provides key concepts and material that prepare participants to advocate on behalf of public education in a manner that garners widespread support; acquires information and enhances skill to identify issues to help them build relationships/partnerships with diverse communities</p>	<p>Engages self and activists in high impact activities that produce racially and socially just policies and culturally competent advocacy plans and strategies</p> <p><b>Training Considerations</b> Provides opportunities to engage in power mapping to help participants understand how to alter the power dynamics to win for each student. It necessitates a recognition of a variety of leaders and groups that represent diverse communities. Through learning how to conduct equity assessments, it helps develop strategies and tactics to secure the support of key decision makers</p>	<p>Ensures best practices are integrated into plans for future endeavors and Association's goals</p> <p><b>Training Considerations</b> Develops strategies to maximize advocacy practices and build diverse partnerships that are well integrated into strategic plans that will increase educator advocacy engagement</p>
Engages and builds mutually beneficial relationships to advance advocacy and political goals	<p>Learns issues to better understand content; shares key messages with members, the community and partners</p> <p><b>Training Considerations</b> Learns key concepts and material that prepare participants to work with diverse communities to garner support for public education; develops skills that help them build relationships/partnerships with communities and serve as a resource to assist with meeting education challenges that impact the entire school community</p>	<p>Creates and implements with others advocacy plans that support student learning, especially for those students most in need; addresses racial and social justice in education</p> <p><b>Training Considerations</b> Creates opportunities to craft and implement advocacy plans that assist participants with brokering, navigating and leveraging community partnerships/relationships that support student learning and leads the professions; provides an opportunity for developing other's skill in learning to perform equity assessments to address policies and practices that are unjust</p>	<p>Organizes collaboratively with community partners around shared interests of the Association and communities</p> <p><b>Training Considerations</b> Provides a process that will help with understanding and developing strategies on how to maximize areas of influence and build strategic partnerships with other unions, community partners, partner organizations, and legislative entities to enhance student outcomes, build stronger schools and increase educator engagement and activism</p>
Interprets and acts on social and racial justice initiatives	<p>Understands and discusses the impact of educational practices and policy on students and the profession using a racial and social justice lens</p> <p><b>Training Considerations</b> Expands understanding of the intersection of policies and practices and racial and social justice principles and explores how to effectively apply a racial and social justice lens (race equity lens) at all levels of the Association especially when attempting to build relationships with the community; develops knowledge, skills and self-awareness while deepening their appreciation of the distinct experiences of individuals and groups and associated power dynamics; strengthens understanding of the importance of the value proposition of the Association and identifying issues</p>	<p>Designs and analyzes advocacy plans and strategies and their impact on educational practices, policies, students and the profession using a racial and social justice lens</p> <p><b>Training Considerations</b> Explores how the application of a racial and social justice lens (race equity lens) when building alliances and identifying resources will assist with engaging stakeholders to support and communicate the principles of racial and social justice at the school/local, Association and community level. At all levels, it is essential to understand how to apply these principles when confronted with social oppression including strategies to communicate courageously about racial and social injustice</p>	<p>Analyzes and strengthens alliances with a diverse and inclusive set of stakeholders to implement, support, evaluate, communicate and sustain racial and social justice</p> <p><b>Training Considerations</b> Builds on participants' knowledge of the principles of racial and social justice to recognize the impact of racial and social injustice on students and educators. Develop strategies and a plan of action to determine the necessary steps needed to address social oppression in education at the workplace or Association and/or in school policies and practices</p>

<sup>1</sup> A race equity lens is a transformative approach used to inform and improve planning, decision-making, analysis, actions and resource allocation that leads to more racially equitable and socially just policies, programs and practices. Each/All – The intentional inclusion and recognition of every individual and the many cultural identities they navigate (e.g., race, ethnicity, gender sexual orientation, religion, ability and employment job category). Diverse – Representative of the experiences and cultural identities of individuals and community (e.g., race, ethnicity, gender sexual orientation, religion, ability and employment job category).

Competency Theme	Level 1: Foundational	Level 2: Mobilizing and Power Building	Level 3: Agenda Driving
Leads public education policy reform	<p>Understands and reports on emerging local, state, and national public education policy and reforms</p> <p><b>Training Considerations</b> Expands understanding of local, state, and national public education policy and reforms, and how education policy and reforms are critical to students, the Association, and larger community; increases awareness of internalized, interpersonal, and systemic racism</p>	<p>Engages and persuades a diverse group of stakeholders to support shared interests in local, state, and national public education policy and reforms</p> <p><b>Training Considerations</b> Explores ways to engage and garner broad and diverse support for local, state, and national public education policy and reforms, applying a race equity lens, that lead legislative entities to enhance student outcomes, build stronger schools and advocacy/activism</p>	<p>Develops credentials and experience in advocacy and collaborates to draft local, state, and national public education policy and reforms</p> <p><b>Training Considerations</b> Builds on knowledge and experience in advocacy that will foster collaboration in the drafting of local, state, and national public education policy and reforms that are critical to the Association and support student learning and lead the profession; uses leadership to position the Association to affect systemic change on public education policy</p>
Acts as a political advocate	<p>Participates in advocacy and political campaign actions, including donating to political action committees, canvassing, phone calling, emailing, petition signing and other activities; encourages other members to become involved</p> <p><b>Training Considerations</b> Gains an understanding of who makes political decisions and how to hold them responsible for their actions or inaction. Learns the fundamentals of political campaigns and take actions that can impact political outcomes; understands the impact of decisions on diverse groups and the larger community</p>	<p>Equips members to become more effective advocates for themselves and others by getting them involved in the political process (at the level that makes sense for them) and provides valuable education, information and research. Connects legislative advocacy to the political process</p> <p><b>Training Considerations</b> Learns tactics of an integrated campaign and how member engagement/activism enhances the overall program. Challenges participants to take higher level actions</p>	<p>Takes a high level leadership role in Association, civic organization, Political Action Committee, campaign, and/or runs for office. Engages the general public around critical issues for students and public education in political campaigns</p> <p><b>Training Considerations</b> Gains refined tools to take charge of political efforts and or run for office; understands the importance of recruiting diverse volunteer activists. Learns how to focus to lead and organize others; and direct or recruit others to be political activists</p>
Makes strategic plans that are data driven and uses analysis and metrics to achieve key advocacy and political goals <sup>2</sup>	<p>Understands core data principles and the importance of using data to secure political power and advocacy wins</p> <p><b>Training Considerations</b> Learns what data is, why it is used to improve Association programs, and the life cycle of data</p>	<p>Uses data and analytics to inform advocacy and political strategies</p> <p><b>Training Considerations</b> Creates plans, determines metrics, and plan reporting. Learns concepts like theory of change and pirate metrics</p>	<p>Uses lessons learned, both qualitative and quantitative, from past campaigns to inform future initiatives</p> <p><b>Training Considerations</b> Explores importance of long-term goal setting, cultural impacts of long-term planning, and logistical realities from a data perspective</p>

2 A race equity lens is a transformative approach used to inform and improve planning, decision-making, analysis, actions and resource allocation that leads to more racially equitable and socially just policies, programs and practices. Each/All – The intentional inclusion and recognition of every individual and the many cultural identities they navigate (e.g., race, ethnicity, gender sexual orientation, religion, ability and employment job category). Diverse – Representative of the experiences and cultural identities of individuals and community (e.g., race, ethnicity, gender sexual orientation, religion, ability and employment job category).

# COMMUNICATION



Build and execute an integrated communications strategy that drives the mission, vision, core values and strategic goals of the Association.<sup>3</sup>

Competency Theme	Level 1: Foundational	Level 2: Mobilizing and Power Building	Level 3: Agenda Driving
Develops a two-way strategic communications plan that focuses on research, planning, implementation and evaluation of communications	<p>Learns the fundamentals of how to develop a focused, communications plan based on research, planning, implementation, and evaluation</p> <p><b>Training Considerations</b> Learns communication theory and its application to the development of a communication strategy. Gains an understanding of what drives a communication strategy and how it is one component of a larger communications planning process</p>	<p>Develops and implements a strategic communications plan with effective messaging and vehicles for the unique needs of diverse constituencies</p> <p><b>Training Considerations</b> Learns how to build audience-specific, message-driven, research-based, linguistically diverse, measurable communications plans to drive Association mission, goals, and priorities. Builds a framework for their Association's communications plan and includes examples of successful communication plan components that will resonate with diverse audiences</p>	<p>Implements a differentiated communication plan that rallies a diverse set of stakeholders to take action and further the goals of the Association and its members</p> <p><b>Training Considerations</b> Learns how to apply communication theory and a four-step process—research, planning, implementation, and evaluation—of communication into action. Continues communication planning work back home and implements the communication plan</p>
Develops individual communication approach and style to fit appropriate audience	<p>Understand the various approaches and styles needed to communicate with diverse audiences</p> <p><b>Training Considerations</b> Learns individual communication skills through assessments – such as those offered by organizations like HRDQ and the Strengths, Values, &amp; Story Survey (SVSS) – to identify and improve the leaders' own communication style, strengths, and limitations. Learns how one's individual communications style adjusts depending on the situation and audience, the importance of inclusive approaches that appeal to all individuals, and the importance of listening to understand versus listen to respond</p>	<p>Tailors communications to appeal to different audiences; adjusts the purpose, substance and style</p> <p><b>Training Considerations</b> Explores how to use shared values, beliefs, and opinions to further resonate with an audience through communication. Learns how to tailor one's individual communications style and strengths to multiple audiences, while staying on Association messages. Develop communication approaches that are effective for racial and social issues</p>	<p>Develops skills to address hostile audiences, defeat challengers, and influence constituents and partners</p> <p><b>Training Considerations</b> Engages advanced practice and simulated presentations and media interviews. Uses real-world situations or examples, to prepare and rehearse for a difficult audience. Learns the important role of interpersonal communications in leadership</p>
Acts as an effective speaker	<p>Demonstrates effective public speaking and presentation skills for a variety of audiences</p> <p><b>Training Considerations</b> Learns the basics of interpersonal communication, public speaking and media training. Gains an understanding of how to be an effective communicator in a variety of settings, with an emphasis on the leader as communicator. Emphasis placed on learning the basics on how to prepare and write for public speaking</p>	<p>Delivers engaging and persuasive speeches, presentations, and media interviews that motivate audiences to take action</p> <p><b>Training Considerations</b> Learns how to build a speech, prepare for a media interview, and other situations in which the leader is serving as communicator for the Association. Engages hands-on work using the NEA Message Framework to develop a simple, three-part message that can be used in an interview or speech. Through role playing, practice, and simulated "on-camera" interviews, participants will practice what they've learned</p>	<p>Acts as a powerful and passionate speaker who can influence agendas and systemic change</p> <p><b>Training Considerations</b> Engages advanced methods for public speaking and media interviews. Provides additional critique and learning opportunities from participants' own examples of speeches or media interviews they have conducted</p>

<sup>3</sup> A race equity lens is a transformative approach used to inform and improve planning, decision-making, analysis, actions and resource allocation that leads to more racially equitable and socially just policies, programs and practices. Each/All – The intentional inclusion and recognition of every individual and the many cultural identities they navigate (e.g., race, ethnicity, gender sexual orientation, religion, ability and employment job category). Diverse – Representative of the experiences and cultural identities of individuals and community (e.g., race, ethnicity, gender sexual orientation, religion, ability and employment job category).

Competency Theme	Level 1: Foundational	Level 2: Mobilizing and Power Building	Level 3: Agenda Driving
Effectively uses current media ( <i>print, broadcast, online, social media</i> ) to communicate	<p>Understands the communications value of current media such as print, broadcast, online and social media</p> <p><b>Training Considerations</b> Explores the current communication landscape as it applies to the Association, its members, and to external audiences. Learns the basics on how to employ earned media, paid media, online media, broadcast media, and social media to successfully deliver Association messages successfully to target audiences</p>	<p>Develops and implements strategic and integrated engagement plans, that utilize a variety of media, technology and social networks</p> <p><b>Training Considerations</b> Learns how to best use earned media, paid media, online media, broadcast, and social media in the Association's overall communication plan. Examines how to match the medium to the message and determine which forms of media are best for members and external audiences. They will continue work following the session to finalize and implement their integrated communications plan</p>	<p>Evaluates and adjusts communications plans for maximum effectiveness</p> <p><b>Training Considerations</b> Engages the tools and practice of how to best measure and evaluate the success of various forms of media chosen in the communications plan. Learns how best to measure and evaluate before, during, and after completion of any communication campaign or plan and how to make corrections and improvements</p>
Identifies and utilizes appropriate messages in acting as a compelling advocate for the organization <sup>4</sup>	<p>Understands appropriate messages and identifies messengers</p> <p><b>Training Considerations</b> Examines the Association's message framework and how to best connect with specific audiences such as members, voters, communities, and parents. Learns the importance of messages and messengers that appeal to diverse audiences</p>	<p>Empowers change, fortifies networks and builds coalitions by forging emotional connections with audiences</p> <p><b>Training Considerations</b> Explores how to develop and apply common beliefs, values, mission and messaging of the Association with coalition partners. Emphasis is placed on the importance of identifying, developing and partnering with individuals/organizations from diverse backgrounds and experiences</p>	<p>Utilizes a variety of messages and message delivery systems to successfully impact change and advocate on behalf of constituents and organization</p> <p><b>Training Considerations</b> Learns message-based strategies that not only build coalitions but also unite sometimes disparate audiences around the Association's key mission, vision, and goals</p>

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# GOVERNANCE AND LEADERSHIP



Sets the mission and establishes and monitors strategies necessary for a relevant and thriving Association while empowering, motivating, and fostering a pipeline of diverse leaders.<sup>5</sup>

Competency Theme	Level 1: Foundational	Level 2: Mobilizing and Power Building	Level 3: Agenda Driving
Effectively executes governance and leadership responsibilities	<p>Understands the roles and responsibilities of various leadership positions as well as the specific duties and legal obligations of governance</p> <p><b>Training Considerations</b> Understands the basic governing principles of duty, care and loyalty, the importance of building a diverse leadership team and deepens understanding of the essential elements of governing and leading in non-profit and union environments; and learns how to tap into personal power to exert influence from any position to promote positive change in today's challenging environment</p>	<p>Creates trusting relationships and builds consensus among leaders on governance activities and strategic objectives</p> <p><b>Training Considerations</b> Increases facilitation skills to enable participants to successfully navigate difficult conversations, chair successful meetings, and learn about situational and culturally relevant leadership (emotional intelligence, cultural intelligence, cultural competency, cross-cultural networking); and utilizes current context and contemporary issues that are of greatest importance to today's leaders</p>	<p>Executes, monitors, and adjusts plans, policies, and strategies to accomplish the short- and long- term objectives of the Association</p> <p><b>Training Considerations</b> Understand the levers of influence, the power of servant leadership and importance of succession planning. Understands the basics of strategic action planning; the fundamentals of developing and leading high performing teams that reflect a diverse Association; how to set priorities and make decisions under pressure; and how to course-correct when needed</p>
Establishes and maintains collaborative and effective relationships	<p>Establishes purposeful relationships to foster collaboration</p> <p><b>Training Considerations</b> Understands why relationships are essential for leadership. Learns how to establish purposeful relationships to foster collaboration. Identifies strategies to engage key stakeholders in establishing meaningful, collaborative, and sustainable relationships</p>	<p>Builds and maintains productive internal and external relationships</p> <p><b>Training Considerations</b> Understands the value of building and maintaining productive internal and external relationships</p>	<p>Leverages internal and external relationships to form authentic partnerships and utilizes those partnerships to accomplish strategic objectives</p> <p><b>Training Considerations</b> Learns how to leverage internal and external relationships to accomplish strategic objectives to foster positive systemic change</p>
Advances the organization by internalizing its vision, mission, and core values	<p>Uses the purpose, culture, and history of the organization, as well as education and union trends to influence the direction of work</p> <p><b>Training Considerations</b> Examines the NEA's mission, vision, and core values as they relate to the organization's purpose, culture, and history by exploring key drivers that led to their adaption and modifications based on strategy, leadership, and goal setting</p>	<p>Empowers others and promotes a culture that appeals to the different motivations of members while recognizing the contributions of all</p> <p><b>Training Considerations</b> Understands the local Association's mission, vision, and core values and hones their leadership skills through activities that build mobilizing and power building cultures. Engages successful strategies used to fulfill organizational commitments (e.g., mission, vision, and core values) at the local, state, and national levels; and understands how to use a mission orientation strategy to nurture the talents of a diverse membership in order to work toward a common vision</p>	<p>Implements strategies that utilize the vision, mission, and core values to drive work and culture</p> <p><b>Training Considerations</b> Explores additional strategies to advance long-term organizational goals by setting and focusing on priorities at the local, state, and national levels; examines how successful implementation practices of the Association's mission, vision, and core values have resulted in positive organizational outcomes through agenda driving actions</p>

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Competency Theme	Level 1: Foundational	Level 2: Mobilizing and Power Building	Level 3: Agenda Driving
Sets strategic objectives to guide long-term goals and priorities	<p>Understands the implications of the organization’s strategy and priorities as it relates to their own actions and tactics</p> <p><b>Training Considerations</b> Explores how an organization’s strategy impact budgeting and their individual actions and tactics. Understands organizational history as well as educational history domestically and abroad, thereby providing a foundation for current events and strategies being employed at various levels of the organization. Engages a SWOT analyses and planning techniques that make up the fundamental elements used to determine strategy; the importance of prioritization and time management for leaders at all levels; and understanding the importance of working at the strategy level versus the tactical level for leaders</p>	<p>Educates others on Association strategies and tactics to advance organizational long-term goals and priorities</p> <p><b>Training Considerations</b> Educates others on Association strategies and tactics to advance organizational long-term goals and priorities. Understands how to: design, execute and communicate strategies; differentiate between strategic thinking and tactical behaviors; and utilize important leadership mental models to better understand and evaluate problems. Explores successful recruitment campaign case studies; relationship building techniques that help leaders build influence and power; and how to build a budget focused on strategy and priorities rather than line-items</p>	<p>Creates value for members by creating and communicating clear and compelling objectives to achieve long-term goals and priorities</p> <p><b>Training Considerations</b> Learns how to create value for members through clear and compelling long term goals and priorities. Explores and understands how to develop organizational mission statements and effectively lead and manage organizational change by building a budget based on their mission and priorities; exploring case studies of transformational leaders and leadership; understanding the importance of generative thinking; and thinking beyond the current and obvious strategies, towards visionary leadership and culture change throughout an organization</p>
Ongoing commitment to personal and organizational culturally relevant leadership development (cultural intelligence, cultural competency, cross-cultural networking) <sup>6</sup>	<p>Identifies own leadership strengths and growth opportunities and works diligently to improve them</p> <p><b>Training Considerations</b> Evaluates where they are as a leader and develops a plan to grow into the leader they want to be. Explores the knowledge, skills and attributes necessary to effectively lead a diverse membership (race, ethnicity, gender, sexual orientation, religion, ability and employment/job category). Examines a variety of leadership styles and explores the various components of what it takes to become the type of leader that people want to follow</p>	<p>Identifies and builds a diverse group of leaders to take on greater roles and responsibilities in the Association</p> <p><b>Training Considerations</b> Evaluates who they are as a leader and continues their path to grow into the leader they want to be. Explores what it takes to help others grow in their capacity as a leader in the Association and understands the importance of identifying, developing and partnering with individuals from diverse backgrounds. Understands the importance of relationships and relationship building techniques in helping oneself and others grow in leadership capacity; and learns ways to use formal and informal pathways to provide opportunities for leadership and assess leadership growth</p>	<p>Develops succession strategies that ensure a successful transition in leadership to sustain the Association's vision over time</p> <p><b>Training Considerations</b> Evaluates who they are as a leader, get feedback from others to inform that assessment as they continue their plan to grow into the leader they want and hone skills to be able to assist others in their plan development and assessment; and understands the importance of aligning individual and organizational goals at the local, state and national levels for enhanced and sustained leadership development and organizational performance</p>

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# LEADING OUR PROFESSIONS



Advocates for professional learning, professional quality and social diversity inside our professions and promotes our union’s role in advancing education transformation, student learning, and equitable access to opportunities.<sup>7</sup>

Competency Theme	Level 1: Foundational	Level 2: Mobilizing and Power Building	Level 3: Agenda Driving
Supports professional excellence and builds capacity for continual improvement and learning to ensure the success of all students	<p>Understands the value of continuous improvement and learning for all educators across their career continuum and what this looks like in practice</p> <p><b>Training Considerations</b> Gains an overview and understanding of the career continuums for ESP and teachers, with a focus on the role of professional learning and reflective practice (e.g. learning cycles) and supports in moving along each continuum and in fostering student learning and growth</p>	<p>Engages with others in meaningful development and models for continuous improvement and learning for all educators across their career continuum</p> <p><b>Training Considerations</b> Understands strategies to lead others in best practices in professional learning and support, such as adult learning theory, models that are effective in professional learning, and ways to ensure that professional learning is embedded in and informed by context. Learns how to use strategies to engage others in securing high-quality professional learning opportunities and supports</p>	<p>Builds and sustains an organizational culture of professionalism and reflective practice that illustrates the professions’ commitment to continuous improvement and learning for all educators across their professional continuums</p> <p><b>Training Considerations</b> Utilizes system-level strategies (e.g. improvement science, labor/management collaboration) to create cultures of professionalism and reflective practice in support of student learning and growth</p>
Recognizes and promotes the Association’s role in improving the learning of all students	<p>Understands the current and evolving role the Association plays in the success of all students, educators, schools and campuses</p> <p><b>Training Considerations</b> Individuals develop an awareness and understanding of how the Association leverages its strengths by identifying student needs in their worksites and implementing member-led solutions to meet those needs</p>	<p>Engages all leaders and members and motivates members from diverse backgrounds to advocate for a meaningful Association role in ensuring the success of all students, educators, schools, and campuses</p> <p><b>Training Considerations</b> Understands how to help and support others identify student needs in their worksites and collectively implement member- and Association-led solutions to meet those needs</p>	<p>Expands and elevates the Association’s role by developing members’ leadership capacity and collaborating with innovative allies to ensure the success of all students, educators, schools, and campuses</p> <p><b>Training Considerations</b> Leads the process of developing and using models and strategies across systems (e.g. labor/management collaboration, partnership and community engagement) to enhance the Association’s ability to drive the success of P-20 education systems</p>
Advocates for policies and strategies that positively impact our professions and the learning of all students	<p>Understands the policies and conditions that impact our professions and learning of all students using a race equity lens</p> <p><b>Training Considerations</b> Individuals develop an awareness of the policies, conditions and skills necessary to impact them (e.g. power mapping decision makers, gathering allies, create narrative based on audience) in order to impact our professions and learning of all students</p>	<p>Advocates, with others, for equitable policies and conditions that positively impact our professions and the learning of all students</p> <p><b>Training Considerations</b> Understands and helps others develop and implement an awareness and the skills necessary to positively impact policy and policymakers (e.g. power mapping decision makers, gathering allies, create narrative based on audience) in order to impact our professions and learning of all students</p>	<p>Builds strategies to ensure sustained, organizational support for the implementation of equitable policies that positively impact our professions and the learning of all students</p> <p><b>Training Considerations</b> Leads the development and implementation of models and strategies to positively impact policy that sustain systems that impact our professions and the learning of all students</p>

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Competency Theme	Level 1: Foundational	Level 2: Mobilizing and Power Building	Level 3: Agenda Driving
Analyzes and applies research to determine the potential impact on our professions and the learning of all students <sup>8</sup>	<p>Understands how to identify high-quality qualitative and quantitative research and how research informs the programs and policies that affect our professions and the learning of all students using a race equity lens</p> <p><b>Training Considerations</b> Develops an understanding of how to find, evaluate, and use high-quality research (e.g. validity, appropriateness for needs, importance, and social and cultural context) to impact our professions and the learning of all students</p>	<p>Understands how to help others utilize research to inform decision-making and the development of effective and equitable programs and policy content to strengthen our professions and the learning of all students</p> <p><b>Training Considerations</b> Engages with others to understand the appropriate use of research in the development, implementation, and evaluation of education policies and programs (e.g. summarize, distill and display complex data and communicate to and with appropriate audiences, integrate relevant research into programs)</p>	<p>Leverages the resources of the organization to collaborate with internal and external stakeholders to analyze, evaluate and communicate education research to strengthen our professions and the learning of all students using a race equity lens</p> <p><b>Training Considerations</b> Lead the development, implementation and evaluation of system-level strategies for communicating research to drive program development and decisions about our professions and the learning of all students (e.g. summarize, distill and display complex data and communicate to and with appropriate audiences, integrate relevant research into programs)</p>

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# ORGANIZING



Mobilizes, activates and engages members and leaders to support internal and external relationships and Association capacity to: recruit, retain and identify diverse groups of members and leaders; and advance strategic priorities at the national, state and local levels.<sup>9</sup>

Competency Theme	Level 1: Foundational	Level 2: Mobilizing and Power Building	Level 3: Agenda Driving
Utilizes best practices, technologies, and methods that through experience and research have led to successful organizing outcomes	<p>Understands the theory and best practices associated with organizing using a racial and social justice lens</p> <p><b>Training Considerations</b> Explores organizing best practices and how to utilize them, including the intentional identification of leaders, a foundational understanding of institutional racism and implicit bias (i.e. strategic readings, case studies from within NEA recent experience)</p>	<p>Develops a successful campaign using organizing skills to engage diverse groups of members on key issues and builds local union capacity</p> <p><b>Training Considerations</b> Exposes participants to the best practices in joining the local membership or organizing committee to plan and help execute an organizing activity and/or field experience, including development of growth and strength goals within a campaign context. Builds on knowledge for addressing institutional racism and implicit bias within organizing strategies</p>	<p>Evaluates campaign strategies to continually improve the impact of future campaigns and organizing approaches through a race equity lens</p> <p><b>Training Considerations</b> Explores the best practices in leading all or part of an organizing activity for a work site or local affiliate including the impacts on student outcomes; advancing racial and social justice by shifting the narrative about race and addressing implicit bias; and the intersectionality of multiple cultural identities</p>
Builds and maintains meaningful community partnerships	<p>Engages diverse groups of audiences in the community to identify common issues</p> <p><b>Training Considerations</b> Explores how and why to build meaningful community partnerships, how to identify appropriate partners, and how to get started in this work. Examines community partnerships and various successful partnership models within the NEA. Apply strengths, weaknesses, opportunities and threats analysis (SWOT) among and between community partners with whom differences exist to ensure a more meaningful partnership or to know when to amicably exit a partnership</p>	<p>Collaborates with all community audiences, to act on shared priorities</p> <p><b>Training Considerations</b> Exposes participants to advanced strategies on building community partnerships that are diverse and cognizant of impact of implicit bias and the principles of racial and social justice. Examines deeply models of successful partnership around common issues, including case studies and review of challenges (and solutions) for sustainable partnership organizing issues using a racial and social justice lens</p>	<p>Transforms the relationship within and among a diverse community to harness the power of collective action</p> <p><b>Training Considerations</b> Provides strategies for effective partnership and coalition organizing around public education issues using a racial and social justice lens. Use successful models, including case studies, of advancing the mission of great public schools by building powerful coalition campaigns</p>
Makes strategic plans that rely on data and analysis to set and achieve key organizing objectives	<p>Analyzes and effectively compiles reliable research data to formulate organizing strategies through the use of appropriate tools</p> <p><b>Training Considerations</b> Engages various data sources to import and export records for analysis related to growth and strength, and to the role of strategic research in organizing</p>	<p>Utilizes reliable data to formulate a foundation for long term plans including objectives, strategies and goals</p> <p><b>Training Considerations</b> Explores advanced data analytics training and advanced use of strategic research and learns how periodic review of data can provide continuous improvement to planning events. Explores exporting data reports for mapping and strategic targeting; targets engagement of member populations (especially new educators and diverse members within leadership roles)</p>	<p>Implements strategic plans that grow a diverse membership and support key Association objectives</p> <p><b>Training Considerations</b> Learns how to actively participate with local or state member organizing committees to set up targets for membership recruitment. Uses strategic research and data mining techniques in organizing and bargaining campaigns. Builds upon mapping and targeting audiences using a race equity lens</p>

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Competency Theme	Level 1: Foundational	Level 2: Mobilizing and Power Building	Level 3: Agenda Driving
Engages in collective action to identify and address pivotal issues	<p>Identifies and engages in high impact and actionable organizing opportunities that drive growth of a diverse membership and advances the mission of great public schools</p> <p><b>Training Considerations</b> Explores case studies and examples of engagement activities in local or state affiliate. Employs methods of identifying appropriate issues for action and identifies the importance of message discipline</p>	<p>Engages others to take advantage of key organizing opportunities, using members' passions and interests, leveraging the power of partnerships, and providing pathways for engagement that impact policy or practice in public education, either locally or at a state level</p> <p><b>Training Considerations</b> Seeks out state affiliate or community organizing and engagement opportunities. Learns what strategies and tactics are and leaves with a menu of campaign options and models. Explores and plans for how racial and social injustice can impact engagement throughout the organizing process</p>	<p>Makes organizing around key issues more systematic and process driven, to improve their impact</p> <p><b>Training Considerations</b> Explores successful collective action campaign models, including case studies, and engages in advanced strategic discussions of structures to foster sustained collective engagement the routine use of collective voice and action to advance racial and social justice and public education</p>
Creates conditions for continuous Association growth and strength	<p>Understands processes and strategies for member recruitment, engagement and retention</p> <p><b>Training Considerations</b> Participates in a worksite or affiliate back-to-school recruitment campaign or listening tour. Learns and practices the Story of Self along with campaign scripts that support successful one-to-one conversations. Understands why capacity building is continuous work in our affiliates</p>	<p>Develops imaginative recruitment and retention strategies that continues to grow the Association's diverse membership and influence others to become more actively involved in the recruitment and engagement process</p> <p><b>Training Considerations</b> Writes a recruitment campaign and engagement plan, based on sharing of models/case studies and including specific goals. Includes Story of Self and a one-to-one conversation script and understands the importance of creating worksite structures (i.e., Building/Department Reps) for capacity building</p>	<p>Influences all members to own the agenda of the Association through their active participation and attitude towards collective action</p> <p><b>Training Considerations</b> Examines local growth and strength plans and learns assessment techniques to inform goal-setting for future plans. Studies successful models of routine, sustainable engagement and retention; implements change that reflect a culture of growth and strength. Develops organizing plans to recruit diverse student members, faculty and staff via ongoing articulation with predominately non-white institutions</p>
Fosters the development of leaders at all levels of the organization <sup>10</sup>	<p>Recognizes leadership in all of its forms and provides opportunities for diverse leadership to flourish</p> <p><b>Training Considerations</b> Practices work site mapping skills within the building to identify colleagues who exhibit special relationships or skills. Practices and conducts one-to-one conversations with colleagues about assuming a leadership role within the Association</p>	<p>Mentors emerging leaders and encourages them to put plans in place to accelerate their level of participation</p> <p><b>Training Considerations</b> Identifies and mentors new leaders about their practice and use of Association leadership and/or professional issues leadership within their worksites. Studies distributive and natural leaders' models and participates in a field experience to identify and recruit leaders, and/or develop a local plan for leadership recruitment and development. Focuses on the recruitment of leaders that have a following, leads in their practice and professions, advances racial and social justice and exhibits an understanding of implicit bias</p>	<p>Advocates for distributive and natural leadership structures and actively supports leadership succession planning</p> <p><b>Training Considerations</b> Engages in intentional leadership development and supports work to ensure sustainability of racially diverse leadership structures within worksites and locals</p>

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# STRATEGY AND FISCAL HEALTH



Use Association resources responsibly to accomplish the goals of the Association through strategic thinking, effective financial management and understanding of fiduciary responsibilities.<sup>11</sup>

Competency Theme	Level 1: Foundational	Level 2: Mobilizing and Power Building	Level 3: Agenda Driving
Acts strategically to align the Association's work with member needs	<p>Understands how the Association's vision, mission, and core values serve as a framework to support diversity amongst its members and member programs</p> <p><b>Training Considerations</b> Learns to formulate the beginnings of a strategic plan by assessing the Association's vision, mission, and core values for inclusivity of all members. Creates a mission statement to serve as the foundation of the Association's strategic plan; explores the next steps in completing a strategic plan representative of the diverse member population</p>	<p>Assesses the strengths, weaknesses, opportunities, and threats of the Association including the use of an equity audit tool</p> <p><b>Training Considerations</b> Learns how to perform an assessment of the strengths, weaknesses, opportunities, and threats (SWOT) facing the Association to inform the development of the Association's strategic plan; understands the role of equity in assessing the needs of members, students, and the broader community</p>	<p>Develops strategic plans to align changing member demographics and evolving member needs with an emphasis on programs that support diversity through new business models</p> <p><b>Training Considerations</b> Learns how to incorporate the Association's vision, mission, and core values along with the assessment of the Association's strengths, weaknesses, opportunities, and threats in order to formulate a strategic plan that supports the needs of members, as well as the long-term financial health for the Association</p>
Understands the interdependency of strategic planning, budget development, and business policy	<p>Utilizes the Association's strategic plan to create a strategic budget that is inclusive of funding to support member diversity and diverse programs</p> <p><b>Training Considerations</b> Learns strategic budgeting basics for maintaining fiscal health</p>	<p>Promotes a culture that recognizes the importance of fiscal responsibility; ensures Association bylaws, other governing documents and policies support financial health</p> <p><b>Training Considerations</b> Learns the importance of regularly reviewing and updating bylaws and policies and establishing reserves to support the strategic plan and budget, as well as, overall financial health</p>	<p>Evaluates the effectiveness of strategic plans using outcome based goals and metrics, actual to budget financial results, and the effectiveness of Association policies to ensure long-term sustainability of the Association</p> <p><b>Training Considerations</b> Gains an understanding of how to review actual to budget financial results, and whether strategic plans need modification to take advantage of opportunities or to mitigate unforeseen losses</p>
Promotes stewardship and financial integrity of the organization	<p>Recognizes the fiduciary responsibility for safeguarding Association assets and demonstrates integrity in all financial transactions</p> <p><b>Training Considerations</b> Understands the fiduciary responsibilities that all leaders are legally obligated to perform on behalf of the Association and its members, in an effort to be good stewards of the Association's reputation and assets. Learns how a code of ethical conduct, conflict of interest, and whistleblower policies, as well as an audit committee, promotes an ethical culture and deters fraud</p>	<p>Adopts financial best practices that support and strengthen Association fiscal health</p> <p><b>Training Considerations</b> Learns how to implement basic internal controls, as well as policies and procedures that reduce the chances of fraud in the Association. Gains tools, such as a monthly bank reconciliation workbook, to implement as part of an internal control system</p>	<p>Identifies Association legal and compliance requirements and ensures obligations fulfilled to maintain the reputation of the Association</p> <p><b>Training Considerations</b> Gains an understanding of legal and compliance requirements to ensure the Association is in good standing with federal and state regulators, and the Association's reputation remains protected</p>

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<b>Supports financial health</b>	<p>Gains basic finance and accounting knowledge and skills to assess the overall fiscal health of the Association</p> <p><b>Training Considerations</b> Learns the simple and easy method for reading financial statements, audit reports, and budgets and how to spot red flags that may signal financial trouble</p>	<p>Identifies Association risk and how to effectively assess and manage risk</p> <p><b>Training Considerations</b> Gains an understanding of the components of a sound investment policy, different types of investments and risk assessment to protect cash and investments</p>	<p>Identifies experts and resources with an emphasis on utilizing persons of color and women-owned businesses whenever possible to aid and support the Association with maximizing opportunities and mitigating risks</p> <p><b>Training Considerations</b> Learns how the Diverse Asset Managers Initiative (DAMI) benefits the Association's pension fund, while at the same time promotes diversity among asset management firms</p>
<b>Utilizes data and analyzes trends to inform decision making<sup>12</sup></b>	<p>Identifies sources of union, financial and educational data to assess the impact on Association sustainability and decision making</p> <p><b>Training Considerations</b> Learns how to utilize your Association's membership data along with its available cash flow to organize the Association</p>	<p>Builds member support for Association strategic goals and objectives by raising awareness of trends and data which include the impact of diverse identities</p> <p><b>Training Considerations</b> Explores evaluating the mission statement of the affiliate or local and how best to establish strategic goals in order to allocate resources towards programs that provide benefit and add value for the members</p>	<p>Utilizes ratios and trends to support responsible decision making and to support Association strategic plans, and strategies for membership and financial growth</p> <p><b>Training Considerations</b> Introduces leaders to the long-term financial planning process; identifies the strengths, weaknesses, opportunities, and threats that the affiliate or local may be facing and how best to create new business models as a result of this assessment</p>

12 A race equity lens is a transformative approach used to inform and improve planning, decision-making, analysis, actions and resource allocation that leads to more racially equitable and socially just policies, programs and practices.  
Each/All – The intentional inclusion and recognition of every individual and the many cultural identities they navigate (e.g., race, ethnicity, gender sexual orientation, religion, ability and employment job category).  
Diverse – Representative of the experiences and cultural identities of individuals and community (e.g., race, ethnicity, gender sexual orientation, religion, ability and employment job category).



## NEA Leadership Development Guide

This guide is intended for individual educators who are curious about their leadership and are ready to start their journey toward self-awareness to become stronger Association leaders (elected and non-elected) and stronger professionals.

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### MEMBER INFORMATION

Name: \_\_\_\_\_ Email: \_\_\_\_\_

State Affiliate: \_\_\_\_\_ Local Affiliate: \_\_\_\_\_

Contact Number: \_\_\_\_\_ Date: \_\_\_\_\_

## Step 1: Develop an Understanding of the NEA Leadership Competency Framework

Read the NEA Leadership Competency Framework guide in its entirety.

*Goal: Develop an awareness of each competency and how each can support you in your growth.*

### Demonstrate Your Awareness

Document how you believe the competency framework can assist you and others.

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## Step 2: Self-Assessment

It is through a deep understanding of yourself as a leader, using the competency framework as a guide, that you will become aware of the knowledge, skills, and abilities you have and those that need developing. After reviewing the framework, educators are encouraged to complete the leadership competency self-assessments at [www.nea.org/leadershipdevelopment](http://www.nea.org/leadershipdevelopment), and record their scores to use as a baseline for measuring growth over time.

*Goal: Assess your leadership and begin to identify growth goals.*

Note: It is recommended that educators view the corresponding module for each self-assessment.

### Self-Assessment Scorecard

Record each competency and overall score.

Competency	Current Self-Assessment Score/Date	2 <sup>nd</sup> Self-Assessment Score/Date	3 <sup>rd</sup> Self-Assessment Score/Date
Advocacy			
Communication			
Governance and Leadership			
Organizing			
Leading Our Professions			
Strategy and Fiscal Health			

## Step 3: Identifying Leadership Goals

After the self-assessment, reflect on why, how, and where you aspire to lead, select a competency(ies) on which to focus.

*Goal: To establish an articulated focus that is grounded in the competencies and outlines the knowledge, skills, and abilities you want to strengthen.*

Consider the following guiding questions as you begin to articulate your leadership development focus.

What competencies will you target for development?

Why is this area of growth (competency) meaningful?

Where do you fall along the progression continuum?

Where do you intend to go?

How does the identified area of growth align with your personal goals? How will you use the skill to lead others and the organization?

How will your growth impact the needs of students, colleagues, your school/district, worksite or campus, and your community?

### Articulate Your Focus

After contemplation of the above questions, articulate your leadership development growth focus using the grid below.

Identify the competency(ies).	Choose competency theme(s).	Identify your current progression level for each theme.	Use the progression levels to identify the behaviors you aspire to develop.

## Step 4: Working Toward Your Goal

Identify and keep track of how you plan to develop the knowledge, skills, and abilities to reach your goal(s); be specific and include dates for each activity and date of anticipated completion. Your action plan will not only clarify the growth you are making, but it will also help you articulate your learning to others. Be specific when developing your action plan. For example, if you want to learn how to engage others to support key organizing opportunities, using members' passion and interests, you should seek or request local, state, and national training opportunities or dedicate time to volunteer in an existing campaign.

*Goal: Develop a written plan, with clear actions and dates, which increases your chance for completion.*

### Writing Your Plan

Your plan should list goals, activities, resources needed, dates completed, and reflect and record what you learned about your leadership.

Tip: Throughout the process, use the questions below to help you remain focused and reflect.

REFLECT	JOURNAL
What activities am I engaged in that will allow me to practice and strengthen my leadership?	
What resources am I using to work toward my goal(s)?	
What are some milestones that would indicate I am making progress toward my goal(s)?	

## Step 5: Post Self-Assessment

After completing the activities listed in your plan (Step 4), complete the self-assessment again to determine your level of growth.

*Goal: To develop the habit of reflection, to measure impact and growth, and determine future actions.*

### Reflect, Recognize, and Redirect

It is likely that your leadership journey will bring challenges and opportunities, causing you to modify your plans. Take the time to celebrate milestones, be prepared to measure growth and look for opportunities to strength your leadership.

As you reach milestones, consider using the chart below to measure and set new goals.

<b>For the competency (ies) you chose, what is the new progression you have reached?</b>	
<b>Reflect on the behaviors for your new Progression Level with the following prompts:</b>  What evidence supports that you have moved to this progression level?  What have you noticed about yourself?  What have you notice about your influence on others?  What do you want to keep doing?  What might you want to do next?  How might you use this new skill to enhance organizational capacity?	

**Next Steps:** Revisit Step 2, retake the self-assessment, record your score in the “Post Score/Date” column, and follow Steps 3 and 4 again. While you may find that your score is proficient in one or more competencies, leadership development is a journey, rather than a destination. Repeating the steps in this guide allows for reflection and continuous growth.

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NOTES





# Leadership Development

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Washington, DC 20036

[nea.org/leadershipdevelopment](http://nea.org/leadershipdevelopment)



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