

2016-2018

NEA STRATEGIC PLAN AND BUDGET

PRESENTED TO THE REPRESENTATIVE ASSEMBLY
JULY 2016



National Education Association

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

NEA Executive Officers

Lily Eskelsen García, President

Rebecca S. Pringle, Vice President

Princess R. Moss, Secretary-Treasurer

John C. Stocks, Executive Director

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The National Education Association

Vision, Mission, and Values

Adopted at the 2006 NEA Representative Assembly

Lily Eskelsen García
President

Rebecca S. Pringle
Vice President

Princess R. Moss
Secretary-Treasurer

John C. Stocks
Executive Director

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.

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The 2016–2018 Strategic Plan and Budget

Introduction

The 2016–2018 Strategic Plan and Budget represents a significant and deliberate shift in focus for the organization towards greater support and investment in local and educator level initiatives that involve collaboration with critical stakeholders to “push up” on the system to impact practice and policy at the district, state, and national levels. While the need for pro-public education politicians to implement appropriate public policy continues to exist, we believe that emphasis on empowered educators truly capitalizes on our greatest asset, our members, and provides them with something they all seem to agree is needed: greater educator decision making in schools and districts.

The environment surrounding public education, its educators, and the organizations that represent them has changed drastically in the last decade. NEA has monitored these changes through our SWOT analysis, completed every two years to examine the internal and external forces affecting public education, the national organization, and its network of state and local affiliates with the goal of understanding capabilities, configuring them to successfully meet the challenges of the environment, and shaping the short and long term strategy. These analyses have highlighted how political, legal, and economic threats, coupled with an institutionalized education reform agenda that favors a corporate model, have created an environment that minimized educator voice and involvement in decisions about teaching and learning and prompted membership losses for the education Associations. As we evaluated our internal capabilities as well as the external opportunities and threats, two main issues emerged. One, the need to win the race to capture the hearts and minds of parents, communities, and educators; the other was the importance of re-building the Association’s strength—our vast network of members at all levels of the public education system. These principles guided the development of the 2016–2018 Strategic Plan and Budget.

Thwarting the threats while simultaneously seizing the opportunities in these trends, led the NEA to move towards a more grassroots approach that authentically involves educators in the decisions required to shape teaching and learning and encourage parents, and communities to join with educators so they can “win” together for the sake of the students and America’s future. This approach is rooted in strong evidence that educators are the “true experts” on the needs of their students, and if they are empowered to shape learning for their students and to collaboratively develop student-centered school plans, the best of educators’ professional practices can be elevated to shape district, state, and federal policies. The opportunity is for NEA and affiliates to facilitate and catalyze these efforts by being the vehicle that reflects the collective voice of educators through the development of structures and processes that engage and involve educators in the decisions that drive public education.

An innovative and aligned strategic plan and budget

To advance the empowerment concepts, the NEA Board of Directors adopted two Strategic Goals and six Core Functions that work together within the 2016–2018 Strategic Plan to:

- 1) Secure opportunities, in partnership with state and local affiliates, for empowered educators to transform the conditions of teaching and learning in collaboration with each other, parents, and communities; engage and deepen relationships with educators as they embark on the quest to shape the future of learning to assure student success; and harness our collective power to grow Association membership and strength while thwarting attacks on member rights and union strength.
- 2) Focus on enhancing the quality of education professions by supporting development across professional continuums and preparing educators for empowered roles in the curation, identification and elevation of professional practices that work, the achievement of educational opportunity and equity, the advancement of national, state, and district level policies, and the creation of solutions designed to improve student outcomes.

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Report of the Program and Budget Committee

The Program and Budget Committee (“the Committee”) is recommending a proposed Strategic Plan and Budget for 2016-2018 that reflects NEA’s commitment to its mission, vision, and core values. The 2016–2018 Strategic Plan and Budget is organized around two Strategic Goals that seek to achieve a specific, focused set of results that can be accomplished and measured in a given period of time and six Core Functions that represent the ongoing work of the Association.

The Committee held engagements on the Strategic Plan and Budget at the National Council of State Education Associations (NCSEA), the National Council of Urban Education Associations (NCUEA), the Education Support Professional, Higher Education, and Retired conferences. Input was received from the NEA Board of Directors, the Student Program, appointed committees, caucuses, the participants at the National Leadership Summit and of course, individual members. All of the input and recommendations were carefully considered and used by the Committee as they reviewed the tactics, activities and proposed resource allocation developed by senior directors and their staff and designed to achieve the strategic goals and the necessary core functions of the organization. It should be noted that many items in the budget are based on policies or mandates as set by the Board of Directors, the Representative Assembly, or the Constitution and Bylaws. It has been the Committee’s task to assign financial resources to accomplish these policy directives, as well as to respond to the immediate and long-range needs of the Association.

As we embark on the 2016–2018 Strategic Plan and Budget, NEA’s external operating environment continues to be challenging. With anti-union sentiments remaining strong, numerous state legislatures are considering bills that would directly impact payroll deduction, agency fee and/or collective bargaining and directly affect our economic stability by diminishing our ability to enroll members and collect dues.

Public education itself also remains under assault, particularly from efforts that tend to blame rather than support educators and to embrace alternatives that transfer public funds to private hands. In the midst of this, our educators struggle to ‘make a difference’ by doing what they know is necessary to educate their students and to meet the increased expectations to strengthen educational outcomes in an environment of diminished resources. The Committee has taken this environment seriously and has ensured that the proposed budget reflects the realities of our current economic conditions while at the same time focusing on and enhancing our greatest asset, our members.

The Strategic Goals address two immediate challenges to ensure student success: (1) Ensure Strong Affiliates capable of setting the stage for Educator Voice and Empowerment; and (2) Ensure that our educators have what they need to be able to lead the transformation of teaching and learning to assure student success. The Core Functions address key, ongoing programs and services essential to NEA and our work. They are: (1) research policy and practice to provide a quality education for all students; (2) partnering with state affiliates to provide programs that increase organizing and the capacity for membership growth, retention, and engagement; (3) advocacy for public policy, social justice, and pro-public education candidates, member advocacy support, and outreach and partnership development particularly in ethnic minority communities; (4) communication strategies to engage members and the public; (5) business operations that ensure an efficient and effective infrastructure; and (6) effective leadership and decision making to advance the organization’s mission and vision.

The 2016–2018 budget allocates funding to state and local affiliates in the form of UniServ grants, Unified Legal Services’ grants, and other project funding totaling \$136,424,667 (38% of the budget) in 2016–17 and 2017–18, respectively.

Chairperson	Princess Moss, Secretary-Treasurer
Vice Chairperson	Becky Pringle, Vice President
Members:	Joshua Brown, Director for Iowa Britt Hall, Director for Wisconsin Rae Nwosu, ESP Director At-Large Robert Rodriguez, Director for California Amy Simpson, Director for Wyoming

FY2016–2018 NEA Strategic Goals and Core Functions

Strategic Goals	
1) GOAL 1: Strong Affiliates for Educator Voice and Empowerment.	NEA will partner with state and local affiliates to strengthen their organizational capacity to: secure opportunities for empowered educators to transform the conditions of teaching and learning through supportive policies, practices, and structures; engage and continually deepen relationships with and relevance to members; and grow Association membership and strength while thwarting attacks on member rights and union strength.
2) GOAL 2: Empowered Educators for Successful Students	In partnership with state and local affiliates and parents and communities, NEA will enhance the quality of education professions by supporting the development of educators across their professional continuums for empowerment roles that elevate the quality of professional practice, shape the future of teaching and learning, achieve educational opportunity and equity, advance national, state, and district level policies, and create solutions designed to improve student outcomes.
Core Functions	
1) Research, Policy, and Practice for Great Public Schools	In partnership with state and local affiliates and allied organizations, NEA will research and synthesize key learnings to develop, identify, and implement national, state, and district policies that facilitate successful practices and models for teaching and learning that promote student success.
2) Organizing	In partnership with state and local affiliates, parents, and communities, NEA will organize to grow and strengthen our Association at all levels in order to improve student outcomes, secure the proper teaching and learning conditions, and achieve educational opportunity and equity for all students.
3) Advocacy and Outreach	NEA and its affiliates, in partnership with parents, communities, and allied organizations, will advocate educators' views to national, state, and district policymakers, stakeholders, and the public to advance policy that achieves equity of opportunity, access, and excellence for students in public education; promotes social, economic, and racial justice for America's students and their families; and secures members' rights and greater empowerment as experts to determine and shape optimal conditions for teaching and learning.
4) Communications	NEA will utilize the best communication strategies to advance the organization's mission and vision by understanding key audiences, engaging state and local affiliates, members, partners, parents and communities, coordinating message development and delivery across the Association, and enhancing the Association's brand and reputation.
5) Business Operations	NEA will administer and support business operations across the Association and its affiliates in a manner that supports the changing needs and priorities of the organization by ensuring efficient and effective infrastructure and sound fiscal management, leveraging technology, and strengthening the Association's human capital.
6) Governance	NEA will develop and maintain leadership development and decision-making structures and processes across the Association and its affiliates that clearly advance the organization's mission and vision.

Budgeted Full Time Equivalent Members and Revenue

Members	Proposed 2016–2017	Proposed 2017–2018
Active – Teaching Professionals	1,720,000	1,720,000
Active – Education Support Professionals	300,000	300,000
Active – Life	40,200	40,200
Agency Fee	31,000	31,000
Retired – Annual	97,000	97,000
Retired – Life	215,000	215,000
Subscriber	13,000	13,000
Reserve and Staff	3,600	3,600
Student	54,000	54,000
Total Members	2,473,800	2,473,800
Revenue		
Active – Teaching Professionals	\$ 321,640,000	\$ 323,360,000
Active – Education Support Professionals	34,050,000	34,350,000
Active – Life	–	–
Agency Fee	5,797,000	5,828,000
Retired – Annual	2,910,000	2,910,000
Retired – Life	1,000,000	1,000,000
Subscriber	65,000	65,000
Reserve and Staff	295,200	297,000
Student	810,000	810,000
Subtotal	\$ 366,567,200	\$ 368,620,000
Other Income and Adjustments	590,000	590,000
NEA Foundation Endowment Fund	(1,902,800)	(1,902,800)
Total Revenue	\$ 365,254,400	\$ 367,307,200

2016–2017 Dues Determination (Proposed)

The 2015–2016 average annual salary of classroom teachers, as determined by NEA research, is projected to be \$58,064 and the 2015–2016 average annual salary of education support professionals, as determined by NEA Research is estimated to be \$32,032.

2017–2018 Dues Determination (Proposed)

The 2016–2017 average annual salary of classroom teachers, as determined by NEA research, is projected to be \$58,645 and the 2016–2017 average annual salary of education support professionals, as determined by NEA Research is estimated to be \$32,512.

Based upon these average salaries, the dues for 2016–2018 will be:	2016–2017	2017–2018
Active – Teaching Professionals	\$ 187.00	\$ 188.00
Active – Education Support Professionals	113.50	114.50
Retired – Annual	30.00	30.00
Reserve and Staff	82.00	82.50
Subscriber	5.00	5.00
Student	15.00	15.00
Dues allocation to UniServ	32.00	32.00

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Goals' Shared Tactics: This work embodies an innovative approach designed to ensure synergy across NEA's goals, Strong Affiliates for Educator Voice and Empowerment and Empowered Educators for Successful Students, and will be accomplished jointly under the collaborative leadership of both Goals' Lead Directors.

Achieving NEA's goals requires certain foundational elements. Highlighting their interrelated nature, efforts to assure that this foundation exists are reflected in the 2016–2018 Strategic Plan and Budget as shared tactics. This means that their execution and monitoring are the joint responsibility of the Lead Directors for the goals.

Organizing for Educator Empowerment: An organizing culture that engages educators in the use of collective power to create opportunities for educators' voices to be elevated on issues that matter to them, and to increase their decision making authority is critical to achieving NEA's goals. With an eye towards the future, this area emphasizes supportive work with educators at the earliest point in their career that demonstrates how indispensable and valuable the association can be throughout their professional continuum.

Coalition Building: Collaboration between educators, with parents and community groups, and other education stakeholders is a key element in assuring that students succeed. Therefore, the facilitation of coalitions and partnerships that support increasing educator voice and influence on decisions related to teaching and learning will be the priority of this area. Methodologies to track return on investment for collaborative efforts will assure continual improvement.

Advancing the Empowered Educators Narrative: Communicating the impact of educator empowerment on student success in an effective manner will facilitate receptivity to the concepts. This area, in partnership with affiliates, will develop message strategies and train messengers to engage internal and external stakeholders and shape the national and local narrative that students have better outcomes and public education has a stronger impact when educators are empowered to make decisions about teaching and learning.

Data, Research and Strategic Listening: Recognizing that affiliates must have access to good data to be successful, considerable effort is being devoted to developing a system for integrating and managing data to support the identification of threats and opportunities and to enhance effectiveness in member engagement. The system resulting from this work will integrate multiple data sources to create a dynamic view of members, potential members and other targeted audiences. It will support efforts to grow membership, and obtain member, voter, and activist engagement, provide efficient business transaction management tools, easy search capabilities and it will facilitate the collection of new data. Careful attention is being paid to system adoption process. Training and networking to share best practices will support the integration of NEA360 into existing and future affiliate programs.

Goals' Shared Tactics

1	Organizing for Educator Empowerment	2016–2017	2017–2018
1	Building for the Union's Future: Engaging and Recruiting Educators at the earliest point in their careers. <ul style="list-style-type: none"> • Create a comprehensive digital organizing and engagement platform that promotes the education professions, provides professional supports to early career educators, and provides avenues to move members from on line to off line engagement. • Develop and deliver pedagogical, social justice, and job family specific professional development that responds to what early career educators articulate they need to be successful in their careers. • In partnership with state and local affiliates, launch Back to School engagements (July 1-November 15) whose goal, through a distributive leadership model, is to ensure that every new educator is engaged in a meaningful one on one conversation with an identified member of the union that collects a uniform set of data points as well as asks the new educator what s/he needs to be successful in her/his career. • Using traditional and non-traditional strategies, identify diverse pool of professional practice leaders to lead in providing early career supports, ESSA implementation and combating institutional racism. 	\$ 5,800,000	\$ 5,800,000
2	Partner with affiliates to create a culture of organizing that uses collective action to create opportunities for our members to elevate their voices and increase their decision-making authority on the issues that matter to them, and that helps members see these opportunities as a value of association membership. <ul style="list-style-type: none"> • Train, support, and partner with affiliates to implement and articulate increased opportunities for educators to participate in policymaking (e.g., through ESSA-related committees) as a benefit of association membership. • Train, support, and partner with affiliates to implement and articulate professional supports (e.g., programming for early career educators, National Board certification support, leadership training, etc.) as a value of association membership and combine them with organizing efforts. • Train, support, and partner with affiliates to implement and articulate their collaboration with districts and other stakeholders around teaching and learning issues as a benefit of association membership, and combine this work with organizing efforts. 	812,780	825,262
3	Partner with affiliates to align and manage member interactions across the Association to increase the quality of member engagement and member activism, increase the depth of relationships between the Association and its members, and educate potential members about the value they can secure by joining their colleagues as Association members. <ul style="list-style-type: none"> • Support affiliates in using member data to plan or offer targeted engagement opportunities. Community partner data-share at the local level. 	178,058	180,640

Goals' Shared Tactics

1 Organizing for Educator Empowerment		2016–2017	2017–2018
4	Promote and increase utilization and awareness of digital strategies to meet organizational goals. <ul style="list-style-type: none"> Develop unified and aligned content strategies, digital engagement standards and enterprise tools and platforms for online organizing, advocacy and professional collaboration, for NEA and its affiliates. Provide technical assistance and training for NEA and SEA staff and leaders to use these digital engagement best practices, strategies and tools. 	\$ 204,264	\$ 205,986
2 Coalition Building			
1	Partner with affiliates to support Association and member led initiatives that involve key education stakeholders (particularly administrators, family, community) to assure quality public educational options for all students, with a special emphasis on schools of greatest need, and to create and develop coalitions and partnerships that will advocate for, support, and encourage educator voice and influence in teaching and learning decisions. <ul style="list-style-type: none"> Develop and track a return-on-investment (ROI) measure that takes educator empowerment support into account; assessing increase in educator voice and influence on teaching and learning. Develop and/or support partnerships around federal and state policy implementation (e.g., ESSA) that increase educator voice and influence in teaching and learning. Develop and/or support partnerships around issues of social justice, with special attention toward addressing institutional racism, decreasing opportunity gaps, and improving student outcomes in disadvantaged communities. Develop and/or support partnerships that will improve professional skills and prepare educators to have greater voice, influence, and decision-making authority on issues of teaching and learning. 	1,972,833	1,996,722
3 Advancing the Empowered Educators Narrative			
1	Partner with affiliates to develop message strategies and train messengers to engage internal and external stakeholders and shape national and local narrative on students having better outcomes and public education having a stronger impact when educators are empowered to make decisions about teaching and learning. <ul style="list-style-type: none"> Develop and refine a public messaging plan that demonstrates to stakeholders the positive impact on students, schools, and communities when educators are empowered to make decisions about teaching and learning. Provide aligned message and media training for local affiliates around NEA's strategic goals and support these affiliates in implementing the messaging plan. 	325,823	329,481

Goals' Shared Tactics

4	Data, Research and Strategic Listening	2016–2017	2017–2018
1	<p>Partner with affiliates to integrate, collect, and manage data to support strategic decision making and to connect our members to the association, to each other, and to education stakeholders.</p> <ul style="list-style-type: none"> • Adoption – Manage the enterprise adoption process in collaboration with state affiliates to ensure successful implementation of NEA360. • Analytics and Innovation – Build an analytic infrastructure and platform and create NEA and affiliate staff capacity to use analytics to more effectively understand our members' needs, advance organizational goals, and to provide additional value to membership. • Build broad, integrated digital strategy in support of an overall communication's plan that advances organization's priorities and uses NEA360 tools in innovative ways and supports digital engagement systems. • Conceive, build, deploy, and adopt an enterprise data system (EDS) that will integrate its multiple data sources to create a dynamic view of members, potential members, and other targeted audiences to grow membership, and member, voter, and activist engagement to achieve the strategic goals of the Association. • Engagement – Collaborate with NEA360 team and SEAs to routinely provide information about project and exchange feedback about implementation. • Learning – Design, implement, and continually refine a learning program and content development to assure the successful adoption of NEA360 technology, collaborating closely with state affiliates. • Product Strategy – Manage the product life cycle as a multi-disciplinary effort with continuous oversight and management and continue to develop work process mapping and procedures to inform the product development. • State Affiliate Assessment and Adoption – Implement, manage, and deliver state affiliate assessment, adoption, training, and support programs • User Support – Design a process to effectively and efficiently address user needs; assess the issues/problems that arise to determine appropriate resolution. 	\$ 7,735,803	\$ 7,828,550
2	<p>Effectively collect, analyze, synthesize, data and research aligned to the strategic research plan and collaborative strategy process to support NEA's strategic goals and inform program and policy.</p> <ul style="list-style-type: none"> • Compile, synthesize, analyze, and distribute data from external resources to inform NEA strategies and programs. • Conduct qualitative and quantitative research and studies with NEA members and other groups to inform NEA programs and policy. • Maintain partnerships and relationships with research organizations focused on topics aligned with NEA's policy and advocacy work. • Monitor and assess the quality of member engagement efforts along a continuum and ensure that they are part of a continuous organizing process that builds lasting relationships between NEA, affiliates, and members contributing to the collective power of the union at all levels through key elements of an effective member engagement program. • Review and synthesize scholarly and think-tank research to inform NEA strategies and programs. 	4,192,053	4,231,867

Goals' Shared Tactics

4	Data, Research and Strategic Listening	2016–2017	2017–2018
3	<p>Ensure that strategic listening to key audiences including NEA members and other groups (e.g., the public and opinion leaders) which is aligned to the strategic research plan and collaborative strategy process informs and drives NEA and affiliate engagement and advocacy strategies.</p> <ul style="list-style-type: none">• Draft, field and analyze research designed to influence key target audiences, including, but not limited to parents and opinion leaders regarding their attitudes to help drive strategic planning and tactical execution to lift the image of the education professions, about NEA, members, education, and NEA’s commitment to student success and share that information with state affiliate communication staff to help inform collaborative campaigns.• Draft, field, and analyze quantitative and qualitative research on behalf of state affiliates and for NEA and share that information across the larger NEA enterprise to build and update comprehensive shared polling warehouse for common questions, trend analysis and shared findings.	\$ 426,855	\$ 431,589
	Direct Cost:	10,265,053	10,265,053
	Personnel Cost:	11,383,416	11,565,044
	Total:	\$ 21,648,469	\$ 21,830,097

Goal 1: Strong Affiliates for Educator Voice and Empowerment—NEA will partner with state and local affiliates to strengthen their organizational capacity to: secure opportunities for empowered educators to transform the conditions of teaching and learning through supportive policies, practices, and structures; engage and continually deepen relationships with and relevance to members; and grow association membership and strength while thwarting attacks on member rights and union strength.

While the Strong Affiliates goal was originally conceived of as a defensive strategy in response to an onslaught of attacks from opponents, the future opportunities surrounding this work are steeped in our ability to turn defense to offense. Through some of the most challenging of battles, we built strength in key organizational elements, giving greater voice to our members and providing the space for educators and community-led solutions to strengthen America's public schools. In the next two years, the Strong Affiliates Goal will continue to work toward the establishment of power through campaigns and advocacy and to develop and secure opportunities to reflect educators' views in decisions related to teaching and learning.

Campaigns and Advocacy: All of the work in this area seeks to partner with and support affiliates in achieving the resources and capabilities they need to accomplish their goals independently. Targeted political, legislative, and issue campaigns are conducted in this area, and seek outcomes that increase educator involvement in teaching and learning decisions, promote educational equity, address institutional racism, and increase sustainable organizational strength. Campaign strategies will be supported by national positions and messages that educate the public about the Association's proactive efforts to support public education. NEA, in collaboration with its affiliates, will leverage our combined communications apparatus to drive high-impact messages to critical audiences. A research component is included to provide 'intelligence' to support offensive and defensive campaigns and to assess education markets in terms of reporting requirements, and statutory and regulatory issues.

Collaborative Structures for Empowerment and Student Success: Sustainable educator empowerment is supported by the existence of structural elements that codify the inclusion of educator voice and engagement in the decisions that affect teaching and learning. Work in this area seeks to expand these structures. Of particular interest is leveraging the many provisions of the Every Student Succeeds Act that encourage implementation to include the development of processes, regulations, policies and joint committees that ensure meaningful and lasting educator involvement through their associations.

Fiscal Health: Affiliate financial stability and sustainable fiscal health are essential foundations of the organization's power to improve America's public school system. Work in this area seeks to ensure that all affiliates have efficient revenue collection systems, timely performance monitoring systems, and effective training for staff, management and leaders. It also seeks to encourage proactive analyses of benefit plans and employee contracts to ensure long-term sustainability.

Goal 1: Strong Affiliates for Educator Voice and Empowerment

1	Campaigns and Advocacy	2016–2017	2017–2018
1	<p>Partner with affiliates to advance political, legislative, and issue campaigns that secure educator voice and influence in teaching and learning decisions, target areas of greatest threat and opportunity, and seek political and legislative outcomes that support great public schools and sustainable organizational power.</p> <ul style="list-style-type: none"> • 2016–2018 Presidential and State Elections – Plan, support, and execute campaigns with metrics and mobilization strategies that meet Association goals. • Campaigns to thwart attacks on educator empowerment – Target legislative crisis and ballot measure assistance to defend and bolster traditional union values (e.g., collective bargaining rights), support strong unions, affiliates, and public education. • Develop and execute a comprehensive policy advocacy program to take advantage of the opportunities in the Every Student Succeeds Act (ESSA) to enact student-centered, educator-developed policies at the state and local levels that leverage the voice and expertise of members and affiliate leaders that support teaching and learning. (e.g., ESSA mandates for decision-making committees at state and local levels that include educators) • In collaboration with NEA affiliates and centers, unite and develop an audience of activists and spokespeople in the fight for public education by developing powerful narratives on issues of shared Association priorities from the perspective of students, educators, parents, and education stakeholders that inspire meaningful actions in support of legislative, issue, and electoral advocacy. • Member Engagement – Identifying and sharing best practices and the tools to support and facilitate member engagement (PAC, Campus Program, Candidate Recruitment). • Opposition Research – Produce research reports and actionable information for NEA and affiliates to utilize in offensive and defensive campaigns and manage strategic research projects. • Support PAC Council in decision making and building strength as one national political force. 	\$ 35,853,373	\$ 35,998,844

Goal 1: Strong Affiliates for Educator Voice and Empowerment

2 Collaborative Structures for Empowerment and Student Success		2016–2017	2017–2018
1	<p>Partner with affiliates to recognize, develop and secure opportunities to codify the incorporation of educator voice in decisions related to teaching and learning, including through laws, policies, coalitions (state and local), agreements, site/district leadership teams and joint committees of practitioners.</p> <ul style="list-style-type: none"> • Prepare affiliates to practice proactive problem solving and joint learning with partners (e.g., GPS Indicators Toolkit, National Collaborative Co-Sponsors, NICs). • Strengthen cross-center, multi-level ESSA implementation team to provide technical assistance, expertise, and materials in support of affiliates' work establishing themselves as the lead partner in collaborative state and local ESSA implementation efforts (including training, webinars, stakeholder conversations, online PD, funding for training hubs around ESSA-related collaborative opportunities, grants for affiliates to build association value stream using ESSA-related opportunities, policy advocacy, and direct member touches to brand increase in educator voice opportunities as an NEA's victory). 	\$ 329,909	\$ 335,074
3 Fiscal Health			
1	<p>Partner with affiliates to achieve financial stability and sustainable fiscal health through efficient revenue collection systems, timely performance monitoring systems, and effective training for staff, management, and leaders at all levels of the Association.</p> <ul style="list-style-type: none"> • Improve capacity to provide analysis, monitoring, and reporting on the membership, economic, and financial indicators required to determine the current and future viability of an affiliate. Fully develop point-in-time and longitudinal reporting that includes documented baseline standards to assist report users in interpreting the reported data. • Provide direct technical and managerial support to NEA and affiliates to enhance the financial and economic skills of staff, management, and leaders throughout the enterprise. Deliver affinity group training, provide networking opportunities to share best practices, and oversee and support NEA Trusteeships and Financial Oversight Committees. • Provide state affiliates with objective analysis of existing employee benefit plans and recommend changes that improve the effectiveness, efficiency, and sustainability of employee contracts. Investigate possible group benefit plans with multiple affiliates sharing in lower benefit costs and reduced administration fees. Conduct an examination of the best combination of benefits to ensure NEA and affiliates attract and retain highly skilled new employees. 	536,684	544,003
		Direct Cost:	28,389,884
		Personnel Cost:	8,330,082
		Total:	\$ 36,719,966
			\$ 36,877,921

Goal 2: Empowered Educators for Successful Students—In partnership with state and local affiliates and parents and communities, NEA will enhance the quality of education professions by supporting the development of educators across their professional continuums for empowerment roles that elevate the quality of professional practice, shape the future of teaching and learning, achieve educational opportunity and equity, advance national, state, and district level policies, and create solutions designed to improve student outcomes.

Work in this area focuses on partnerships with affiliates to assure leader and member readiness to provide high quality instruction, to lead collaborative initiatives and to provide relevant educator-led, association-branded programs and tools for every phase of the educator career continua, with emphasis on high impact transition points. Information on the most promising models for comprehensive induction, professional development, networking teams, mentoring, etc. will be gathered here and best practices will be documented, with the goal of encouraging their spread. This area focuses on building awareness of the detrimental impact unconscious bias has on educators' relationships and effectiveness with their students and includes programs to address institutional racism. Efforts to transform schools also are housed in this goal.

Educator Development for Practice and Leadership: Efforts in this area will be directed to assuring quality professional practice among educators through Association-convened, educator-led initiatives, that are useful throughout the entire educator career continua, with emphasis on preparation and readiness of early career educators.

Affiliate Strength for Professional Practice and Growth: This area seeks to support affiliate efforts to assure quality professional practice and growth across the career continua.

Student-Centered Policy and Practices: Work to engage members in assuring quality public education for all students through Association-led school improvement and student-centered policies and practices.

Readying Educators for Empowerment: This area focuses on improving member capacity to raise their voices and participate in the decision making processes that shape teaching and learning.

Goal 2: Empowered Educators for Successful Students

1	Educator Development for Practice and Leadership	2016–2017	2017–2018
1	<p>Partner with affiliates to assure quality professional practice among educators through Association-convened, educator-led initiatives, with emphasis on preparation and readiness of early career educators.</p> <ul style="list-style-type: none"> Based on a mapping of the educator career continua, where high leverage transition points have been identified, provide relevant educator-led, affiliate branded programs and tools for every phrase of the educator career continua, with emphasis on high impact transition points. Build affiliate capacity and expertise to create and/or expand educator-led, affiliate-branded programs that shape educators' professional practice bullying, ELL, LGBTQ and sexual harassment/safety and bias (Best practice, whole student, Leadership for Tomorrow, and ESP conference). Build affiliate capacity and expertise to create and/or expand educator-led, affiliate-branded programs that shape educators' professional practice bullying, ELL, LGBTQ, and sexual harassment/safety and bias. Build affiliate capacity and expertise to create and/or expand educator-led, affiliate-branded programs that shape educators' professional practice in the areas of cultural competence, diversity, and social justice with the goal of counteracting the impact of institutional racism. Collect and synthesize effective approaches and encourage implementation of promising models re: comprehensive induction programs, professional development, networking teams, and mentoring. Prepare affiliates to support state and local leader readiness, along with member readiness, to lead collaborative initiatives through the use of the GPS Fund program. 	\$ 11,575,493	\$ 11,629,719
2	Affiliate Strength for Professional Practice and Growth		
1	<p>Partner with affiliates to improve affiliate capacity for assuring quality professional practice and growth across the career continua (anti-privatization, ESP of the year and professional development).</p> <ul style="list-style-type: none"> Prepare affiliates to support state and local leader readiness, along with member readiness, to lead collaborative initiatives. Support for affiliates leading district programs that impact teaching and learning. 	4,499,575	4,538,310
3	Student-Centered Policy and Practices		
1	<p>Partner with affiliates to engage members in assuring quality public education for all students through Association-led school improvement and student-centered policies and practices.</p> <ul style="list-style-type: none"> Support for community schools model implementation. Technical assistance for school transformation. Technical assistance to local affiliates participating in school transformation. 	2,679,399	2,717,272

Goal 2: Empowered Educators for Successful Students

4	Readying Educators for Empowerment	2016–2017	2017–2018
1	Partner with affiliates to improve member capacity to raise their voices and participate in education decision making.	\$ 307,246	\$ 311,119
	<ul style="list-style-type: none"> • Training for affiliate leaders on professional issues organizing 		
2	Partner with affiliates to enhance educator awareness of the impact of institutional racism on educator practice and student outcomes.	1,376,769	1,389,251
	<ul style="list-style-type: none"> • Support for affiliates in raising awareness of the detrimental effects of institutional racism, the ways that unconscious bias impacts educators' relationships with their students, and the ways that our schools perpetuate social injustice, as first steps in an ongoing effort to address institutional racism and counteract its effects on students and communities. • Training and facilitating support for affiliates to develop and implement plans to decrease the negative impact of institutional racism in classrooms and schools. 		
	Direct Cost:	12,958,437	12,958,437
	Personnel Cost:	7,480,045	7,627,234
	Total:	\$ 20,438,482	\$ 20,585,671

Core Function 1: Research, Policy, and Practice—In partnership with state and local affiliates and allied organizations, NEA will research and synthesize key learnings to develop, identify and implement national, state, and district policies that facilitate successful practices and models for teaching and learning that promote student success.

The work of this Core Function is designed to focus on areas relevant to NEA's goals and deliver vital, ongoing analyses directly linked to providing policy, practice, and research strategies/support to undergird efforts to create a great public school for every student. Recognition as an effective advocate for the education profession requires the development and application of quality research. Understanding our members' hopes, desires, and needs will enable us to be more relevant to their work lives. Focusing on workforce quality and supports that facilitate educator empowerment will allow us to create the conditions for great public schools. And, having the work examined through a "student-centered lens," will position educators to be true leaders of their own profession.

Policy Advancement: Work in this area supports association efforts to advocate for federal and state legislation and regulations that promote policies and practices to enhance educator empowerment, student learning and workforce quality.

Information and Expertise: This area provides information and expertise in a vast array of areas by providing research, information, and expertise to affiliates, leaders, members, and staff to support the efforts to improve teaching and learning.

Core Function 1: Research, Policy, and Practice

1	Policy Advancement	2016–2017	2017–2018
1	<p>Analyze federal legislation and regulations that enhance educator empowerment, student learning, and workforce quality through good policies and practices. Advocate and provide information and technical assistance for affiliates to ensure that they are positioning the association and its members to take advantage of state- and district-level policies that provide opportunities to increase educator voice and empowerment.</p> <ul style="list-style-type: none">Analyze federal legislation and regulations to advance federal public policy that is in alignment with GPS Criteria and Indicators and with NEA positions.	\$ 464,983	\$ 473,591
2	Information and Expertise		
1	<p>Provide research, information, and expertise to affiliates, leaders, members, and staff to support their efforts to improve teaching and learning.</p> <ul style="list-style-type: none">Coordinate the activities of the Early Childhood Education Leadership Cohort (ECELCO) to provide early language, mathematics, and science literacy and early childhood policy trainings to affiliates and members.Provide support for NEA’s Individuals with Disabilities Education Act (IDEA) efforts to enhance technical assistance, materials, and resources for affiliates and NEA members.Provide technical assistance, policy analysis, materials, and information to state and local affiliates, and host or participate in NEA and affiliate meetings to gather and share information.Respond to requests for statistics and other information from affiliates, leaders, and other departments.Support affiliates, leaders, and other departments by distributing and processing pre-made surveys (e.g., OpScan, UniServ), and consulting on research and evaluation activities.	979,442	994,290
	Direct Cost:	322,979	322,979
	Personnel Cost:	1,121,446	1,144,902
	Total:	\$ 1,444,425	\$ 1,467,881

Core Function 2: Organizing—In partnership with state and local affiliates, parents, and communities, NEA will organize to grow and strengthen our Association at all levels in order to improve student outcomes, secure the proper teaching and learning conditions, and achieve educational opportunity and equity for all students.

An engaged and growing membership contributes to our collective power and ability to positively influence the conditions under which students learn and our members work. NEA must be relevant to our members' professional lives to ensure continued and growing membership and sustained organizational capacity.

Membership and Organizing: This area is laser focused on figuring out how to grow membership. Their plans are to use member and leader engagement, technical assistance and research-based campaigns that are engineered to add to our knowledge about what works. Specific attention is placed on educator voice and empowerment, facilitating educator designed and developed practices and policies that improve the quality of education for all students, developing and supporting the implementation of alternative dues collection options, and developing models for new and nontraditional membership types. Affiliate capacity also is addressed through the leadership and staff development initiatives and assistance provided to state and local affiliates.

UniServ Program: Administers the UniServ Grant Program and provides training to UniServ staff and UniServ managers.

Regional Offices: Coordinates program delivery and facilitate dialogue between NEA and affiliate leaders. Regional Directors are also responsible for supervising organizing projects and staff assigned to them.

Constituent Support: Provides program support to the National Council of Urban Education Associations and under the direction of the Executive Director of the National Council of State Education Associations, supports the NCSEA Board by providing trainings and conferences as well as confidential support to affiliate leaders.

NEA Student Program: Responsible for student organizing and administering the student program through conferences, training, and support to state affiliates.

Conferences and Trainings: Conducts the following conferences: NEA Higher Education, NEA Retired, NEA Student, and Summer Leaders. In addition, the Center delivers the following trainings: Emerging Leaders and UniServ.

Core Function 2: Organizing

1	Membership and Organizing	2016–2017	2017–2018
1	<p>Identify and develop workplace leaders through Engagement Unionism. Providing them with opportunities to engage, organize, and mobilize colleagues around self-identified issues that support educator voice and empowerment.</p> <ul style="list-style-type: none"> • Develop an organizing culture that increases NEA membership through engagement and growth strategies. • ESSA field implementation through regional support, targeted projects and engagement with grassroots partners. • Identify existing organizing best practices through multiple vehicles that include webinars, regular reporting, use of documentary video, and cross-training of staff and leaders in active organizing sites. • In collaboration with the Center for Great Public Schools, incubate and assess professional issue campaign organizing projects to demonstrate membership growth strategies. • Maintain dedicated organizing committees and task forces among NCSEA, NCUEA and other groups in order to foster two-way communication between NEA's work and that of affiliates and locals. • Support state and local affiliates' "scratch" organizing campaigns of new units with particular attention to charter schools and higher education. • Use research and data analytics to inform targeting of resources and drive resources toward organizing campaign efforts most likely to succeed and also design and implement procedures for measuring the progress and outcomes of the Center's work at targeted sites based on precise goals and regular reporting of progress. • Utilize and continue to refine best practices to support state and local affiliates who have lost or are in danger of losing payroll deduction or agency fee with alternative dues collection. • Working in partnership with NCUEA, create opportunities for sharing strategies, resources, and programs that support and foster the successful implementation of the NEA-NCUEA shared priorities and partners with NCUEA to lead in a culture of organizing and demonstrating successful approaches to organizing at the local level. 	\$ 14,957,155	\$ 15,110,587

Core Function 2: Organizing

1	Membership and Organizing	2016–2017	2017–2018
2	<p>Develop and train necessary skills for affiliate leaders and staff to thrive as organizers.</p> <ul style="list-style-type: none"> • Design and deliver executive leadership development opportunities for NCSEA that identify critical issues, management development, leadership development, and related competencies and skills that support the president and executive director to successfully fulfill their roles. Coordinate affiliate leadership conference/trainings (Collective Bargaining, Fall/Summer Leaders, Affiliate Financial Health). • Design and deliver organizing training for state affiliate staff through the UniServ Academy, UniServ Managers meeting, and staff training cadres based on the UniServ Core Competencies. • Provide technical and conceptual training in data systems/analytics and social media skills to NEA and affiliate staff and leaders using multiple vehicles. • Regional and state based training opportunities designed to scale up access to and acquisition of membership engagement (Education Summer). • Support and deliver member conferences and trainings (ELA, Higher Education, and Retired). • Utilize local training venues that support local/state team structures with an emphasis on organizing campaigns and core competencies model that includes follow up groundwork to increase capacity. Deliver local presidents organizing training to increase their capacity to organize and lead members. 	\$ 5,923,165	\$ 5,973,951
3	<p>Develop digital and social media engagement models and opportunities targeting incoming and existing early career educators, engaging them around professional growth and education justice.</p> <ul style="list-style-type: none"> • Develop bridge (software) from student teaching to active membership. • Develop ESSA implementation targeting young member engagement around issues meaningful to them such as closing the achievement gap, college affordability, and income equality. Early career educator leadership development by partnering with school districts and local associations. • Student bridge to NEA membership. Design and implement strategic outreach/organizing efforts to graduating seniors. Partnering with local universities for research based campaigns to include issues meaningful to them such as closing the achievement gap, college affordability, and income equality. Coordination of the Student Conference and Grant program. 	3,578,324	3,623,084

Core Function 2: Organizing

1	Membership and Organizing	2016–2017	2017–2018
4	<p>Partner with state and local affiliates to develop and expand their capacity and enhance their effectiveness.</p> <ul style="list-style-type: none">• Develop and implement an enterprise wide system to detect emerging threats and opportunities which could affect multiple affiliates and assess affiliate and NEA capacity to respond. Administer the National Education Employees Assistance Fund (NEEAF).• Intervene in state affiliates to provide strategic facilitation for leader/staff/ team development.• Leverage Association impact, grow, and deepen affiliate capacity through the administration of policies and guidelines and disbursement of funds for the Affiliate Financial Assistance Program (AFA).• Leverage Association impact, grow, and deepen affiliate capacity through the administration of policies and guidelines and disbursement of funds for the Local President Release Time Program (LP RTP).• Leverage Association impact, grow, and deepen affiliate capacity through the administration of policies and guidelines and disbursement of funds for the Small States Foundation Program.• Leverage Association impact, grow, and deepen affiliate capacity through the administration of policies and guidelines and disbursement of funds for the Unified State Executive Director Program (USEDP).• Leverage Association impact, grow, and deepen affiliate capacity through the administration of policies and guidelines and disbursement of funds for the UniServ Fund Program.• Provide coordination through policy application, adherence to guidelines and financial allocation to the Center’s state and local project programs, develop an enterprise wide system that will provide disbursement, tracking, and assessment functionality to the Association while providing a single point of contact for affiliates seeking membership, engagement, and/or organizing opportunities.• Strengthen NEA and affiliate partnership through on-going communication, coordination, resources, and support.• Working in partnership with NCSEA, create opportunities for inter-state sharing of strategies, resources, and programs that support and foster the successful implementation of the NEA-NCSEA shared priorities.	\$ 77,406,626	\$ 77,469,458
	<p>Direct Cost:</p>	82,909,695	82,909,695
	<p>Personnel Cost:</p>	18,955,575	19,267,385
	<p>Total:</p>	\$101,865,270	\$102,177,080

Core Function 3: Advocacy and Outreach—NEA and its affiliates, in partnership with parents, communities, and allied organizations, will advocate educators’ views to national, state, and district policymakers, stakeholders, and the public (with priority focus on parents, ethnic minority communities, and labor partners) to advance policy that achieves equity of opportunity, access, and excellence for students in public education; promotes social, economic, and racial justice for America’s students and their families; and secures members’ rights and greater empowerment as experts to determine and shape optimal conditions for teaching and learning.

The work in Advocacy and Outreach will be prioritized in large part to achieve the Strong Affiliates and Empowered Educators Goals and to support state and local affiliates. The priorities of the ongoing work of Advocacy and Outreach will be driven by our need to ensure that our members have a voice in their workplace and in education policy-making arenas; the need to empower educators around areas of professional practice and the promotion of social justice for students; the need to create a movement which puts students and their families at the center of an agenda to create Great Public Schools for Every Student, and the equally urgent need to promote economic and social justice to help close income gaps and opportunity gaps in education.

Advocacy: Supports the Association’s efforts to improve public education through federal, state, and local (in partnership with affiliates) advocacy, coalition building, and outreach as well as the Association’s social and economic justice advocacy in collaboration with partners.

Advocacy Tools and Technical Assistance: This area provides tools, support, technical assistance and legal services to affiliates seeking to mobilize to promote policies and strategies to improve teaching and learning conditions, educational outcomes, and to advance our members’ rights and voices. Assistance is provided in the form of policy analysis, model legislation or policy, sample contract or school policy language, other advocacy tools, and technical assistance.

Outreach: This area focuses on fostering partnerships with parents, families, communities, and other stakeholders, that are essential to quality public education and student success. Collaboration with outside organizations about social justice and civil rights issues, member rights and community issues, particularly in minority and ethnic communities, is housed in this Core Function.

Leadership Development: This area provides leadership development training that is aligned with and in addition to the NEA Leadership Competencies to specific constituencies (women and ethnic minorities) among our membership to better equip them to be activists, organizers, and leaders to improve the outcomes for students, particularly in marginalized and underserved populations.

Member Engagement and Outreach: This area provides training and strategies to engage, mobilize, and organize members to advance NEA’s student-centered social-economic justice agenda and supports the Association’s efforts to achieve Great Public Schools through advancing federal legislation which promotes educational equity for all students.

Governance Support and Engagement: This area provides technical assistance and support to NEA leaders to advance policy and practice that supports NEA’s mission, vision, and core values.

Core Function 3: Advocacy and Outreach

1	Advocacy	2016–2017	2017–2018
1	<p>NEA’s Government Relations department supports the Association’s efforts to achieve Great Public Schools for every student through federal legislation to ensure equity for students who are most in need, empower educators to have a voice in the policies that affect them and their students and support policies to strengthen public schools, colleges, universities, and communities for the children and families who live and go to school there.</p> <ul style="list-style-type: none">• Advance and pass pro-public education legislation and policy at the federal level, including within the Administration, which maintains a federal focus on students most in need (i.e. high-poverty, special education, ELL), empower educators to directly share the successes, challenges and needs of their schools and students, and promote student centered social and economic justice causes.• Prevent anti-working family legislation from passing at the federal level, including threats to retirement and economic security, collective bargaining, privatization and secure funding to address inequities for public K–12 and higher education including empowering educators to directly share how such legislation would impact their students, their families and/or their communities.• Provide legislative intent, training, strategy and technical assistance around NEA’s ESSA implementation efforts.• Provide technical assistance to NEA state affiliates on their legislative advocacy at the state level.	\$ 2,348,342	\$ 2,383,418

Core Function 3: Advocacy and Outreach

2	Advocacy Tools and Technical Assistance	2016–2017	2017–2018
1	<p>Enhance collective bargaining and advocacy, with a focus on a student-centered agenda and employee rights, by providing support and technical assistance to affiliates and NEA Departments in the areas of collective bargaining, adequate and affordable health care, retirement security, and equitable and transparent compensation practices that attract and retain a high quality workforce.</p> <ul style="list-style-type: none"> • Advance student-centered bargaining and advocacy through grants, technical assistance, and advocacy tools for state and local affiliates. • Develop and provide proactive approaches to protecting and defending public pensions and public educator retirement security through technical assistance and training to affiliates and NEA departments; monitor and report on member retirement plans. • Lead NEA work on local-level bargaining and policy advocacy to implement ESSA in a manner that empowers educators across their careers and achieves the schools our students deserve. • Maintain, update and disseminate tools used to track collective bargaining developments and assist local affiliates in achieving bargaining and local advocacy goals; assist affiliates with bargaining strategies; provide technical assistance and training on bargaining and advocacy approaches to selected public policy, legislative, and contract issues, including advocating with or without agency fee. • Provide technical assistance and training to affiliates on compensation practices, including salary/living wage campaigns, alternative compensation arrangements, and NEA compensation applications; track and maintain information on alternative compensation programs and the teacher salary database. • Provide technical support and training to affiliates and NEA departments on health care benefits and health care laws impacting members, and work to implement federal health care reform in accordance with NEA policy. • Solicit and administer funding to create formal union-management partnerships across districts and in schools that foster greater collaboration among educators and engage parents and the community. Develop and disseminate tools and provide technical assistance and provide training on implementing and sustaining collaborative practices. 	\$ 2,793,109	\$ 2,834,866
2	<p>Administer the Unified Legal Services (ULSP) and the Expanded Support of State Affiliate (ESSA) Programs to strengthen affiliate capacity to defend, advocate, and advance the rights of members.</p> <ul style="list-style-type: none"> • Administer the Expanded Support of State Affiliates (ESSA) program. Investigate the feasibility of integrating this NEA board approved program into the ULSP. • Administer the Unified Legal Services Program (ULSP) and the NEA-funded legal cases (Federal Appeals, Significant Litigation, and Catastrophic Assistance) programs by performing site visits and on-line audits to verify compliance with the NEA board approved guidelines. Timely response to affiliate and member requests and appeals for review of denial of legal services. 	23,903,934	23,914,694

Core Function 3: Advocacy and Outreach

2 Advocacy Tools and Technical Assistance	2016–2017	2017–2018
3 Administer, enhance, and promote NEA insurance programs that support member recruitment, defend members from false criminal accusations; protect members, leaders, and staff from professional liability lawsuits; minimize the impact of fiduciary losses; and indemnify affiliates against errors and omissions. Negotiate policies that maintain (and increase, where possible) liability and fiduciary protections.	\$ 13,419,517	\$ 13,429,853
<ul style="list-style-type: none"> • Administer the Association Professional Liability (APL) program; respond to all affiliate and staff questions regarding eligibility determinations; and provide fiduciary oversight of all negotiated policies and contracts. • Administer the Attorney Referral Program (ARP); respond to all affiliate and law firm questions regarding participation and benefits; and maintain listing of all participating law firms on NEA.org. • Administer the Educators' Employment Liability (EEL) program; respond to all affiliate and member questions regarding eligibility determinations; provide fiduciary oversight of all negotiated policies and contracts; and perform comparative analyses of similar programs offered by competing organizations. • Administer the Fidelity Bond (FB) program; respond to all affiliate and staff questions regarding fiduciary loss claims; and provide fiduciary oversight of all negotiated policies and contracts. • Provide technical and business expertise to ITS to upgrade/replace existing legacy systems; participate in any request for proposal (RFP) activities to replace end-of-life software; and perform testing and quality assurance activities to ensure efficient and responsive software systems that meet the needs of affiliate staff. Maintain and support the software systems that underpin the ULSP, ESSA, EEL, APL, FB, and ARP systems (DLMS, eBilling, York Import, Cognos Web Reporting, and ARP Access). Provide technical assistance to affiliate users with access issues, functionality questions, customized report generation, and staff training that supports program administration. Deliver program updates and training to stakeholders. 		
4 Promote and support external partnerships that advance NEA's policies on collective bargaining, compensation, health care, and retirement security in order to achieve great public schools for every student.	510,627	512,779
<ul style="list-style-type: none"> • Participate in, represent NEA at, and ensure NEA policy goals are furthered with external partners in the health care, public pension, and economic justice arenas. 		
5 Conduct the Human and Civil Rights pre-RA and NEA Board events to address current trends with a direct focus on mobilizing our members to impact racial, social and economic justice for educational equity.	1,572,751	1,584,157
<ul style="list-style-type: none"> • Conduct NEA Board Observances and connect the work of the Observances to addressing institutional racism. • Conduct the NEA Joint Conference on Concerns of Minorities and Women and the Ethnic Leaders Meeting with a continued increased focus on developing activists in the organization to be leaders on racial, social, economic and environmental justice in and out of the Association. • Hold the Annual Human and Civil Rights Awards Dinner to honor heroes for social justice, economic justice and institutional racism. 		

Core Function 3: Advocacy and Outreach

2	Advocacy Tools and Technical Assistance	2016–2017	2017–2018
6	<p>Advance NEA's student-centered social, racial, and economic justice agenda in public schools through leadership development, policy development and analysis, the development of advocacy tools, and collaboration with external partners and state and local affiliates.</p> <ul style="list-style-type: none"> • Develop strategic content partnerships with LGBTQ, anti-bullying, dropout prevention, women's minority, and social justice organizations to position NEA as a leader in human and civil rights and social, racial and economic justice. • Enhance and expand the BullyFree "It Starts with Me" campaign. • Provide assistance and support to affiliates through advocacy language, policy briefs, analysis, advocacy tools/resources and messaging on critical civil rights and social and economic justice issues, such as institutional racism and ending the "school to prison pipeline" 	\$ 1,553,066	\$ 1,571,143
7	<p>Support affiliates in identifying and engaging partners within the ethnic/ minority community (communities of color) that are immersed in work involving parental engagement and community organizing to move a student-centered and racial, social and economic justice advocacy agenda.</p> <ul style="list-style-type: none"> • Partner with affiliates to build state and local capacity to develop innovative and strategic outreach strategies and community conversations between educators, parents, and community stakeholders to raise educators' collective voices with the community around a social, racial and economic justice agenda that is student centered. • Partner with affiliates to enhance member advocacy by hosting collaborative joint advocacy strategy sessions between national, state, and local partners with NEA leaders and member activists to plan and implement strategies around NEA organizational priorities (i.e. ESSA, institutional racism, and others) and other opportunities to advance a student-centered agenda. • Partner with state and local affiliates to organize in communities of color to increase student achievement, engage communities of color (parents and community stakeholders) and build union roles at the state and local level for community engagement to build capacity to aggressively push a student-centered agenda. • With a focus on targeted areas and communities most effected by inequity, identify, train and develop member activists at the state and local level to progress community conversation into relevant community action; securing opportunities for student success and racial, economic and social justice. Eventually creating a train the trainer model for community engagement to build state and local capacity. 	1,281,868	1,297,146

Core Function 3: Advocacy and Outreach

3	Outreach	2016–2017	2017–2018
1	<p>Conduct an Association-wide strategic approach to outreach that leads to meaningful partnerships and organizing opportunities which focus on racial, social and economic justice, and student success that engages parents, ethnic/minority communities, progressive communities, and labor coalitions to advance our strategic goals, mission, vision, and core values.</p> <ul style="list-style-type: none"> Assist NEA affiliates, with a particular focus on state and local leaders, to enhance and learn from their member engagement and organizing initiatives to deepen or create partnerships around minority community outreach and engagement, including assessing gaps in affiliates' partnerships and outreach efforts, as well as supporting and enhancing MLTP and WLTP graduates and other identified member activists to organize in communities around social, racial and economic justice issues such as institutional racism. Conduct joint advocacy with partner organizations around shared core values and advocacy priorities, particularly those priorities which impact poor students and their families, as well as marginalized student populations impacted by institutional racism. This includes monitoring trends and providing leadership regarding the human and civil rights issues facing minority and/or marginalized students. Identify and enter into partner agreements with entities that will assist in achieving NEA's strategic goals and provide technical assistance to local affiliates to engage minority communities; including engaging them on racial, social and economic justice issues. Identify and enter into partner agreements with entities that will assist in achieving NEA's strategic goals and provide technical assistance to local affiliates to engage minority communities. Identify new and potentially impactful organizations and entities, as well as identify trends in outside organizations' advocacy, organizing, civic engagement, communications, or research strategies which may impact NEA's work. Partner with national, state, and local partners on ESSA implementation to influence public policy at the state and local level in support of a social, racial and economic justice agenda that is student centered. 	\$ 7,342,669	\$ 7,354,936

Core Function 3: Advocacy and Outreach

4	Leadership Development	2016–2017	2017–2018
1	Mobilize and empower educators through Association-led leadership training and development to become effective Association advocates and leaders who advance the social, racial and economic justice. <ul style="list-style-type: none"> Coordinate the engagement of HCR State Coordinators to support greater connection to the human and civil rights and social economic justice work occurring at the national, state, and local level. Provide diversity, social justice, and cultural competence training to assist the Association, leaders and members. The Minority and Women’s Leadership Training programs prepare early career educators and emerging leaders to be powerful advocates for their students, their profession, and their Association. The hands-on training curriculum teaches participants foundational leadership skills, the logistics of running for elected office, and how to advocate for student-centered policies and social justice issues that impact their schools and communities. 	\$ 2,260,913	\$ 2,271,673
5	Member Engagement and Outreach		
1	Support strategies to engage, mobilize, and organize members to advance NEA’s student-centered social-economic justice agenda. <ul style="list-style-type: none"> Create and maintain a database to facilitate the implementation of an engagement program with the goal of identifying, educating, and mobilizing member activists and organizers. 	197,456	200,254
2	NEA’s Government Relations department supports the Association’s efforts to achieve Great Public Schools for every student through federal legislation to ensure equity for students who are most in need, empower educators to have a voice in the policies that affect them and their students and support policies to strengthen public schools, colleges, universities, and communities for the children and families who live and go to school there. <ul style="list-style-type: none"> Enhance the capacity and strength of NEA’s federal advocacy by building off of the successful member advocacy efforts during ESEA, engaging directly with members through digital advocacy and creating a structure for more lasting engagement on behalf of pro-public education and student-centered social and economic legislation. 	901,025	914,797

Core Function 3: Advocacy and Outreach

6 Governance Support and Engagement		2016–2017	2017–2018
1	Provide technical assistance and support to NEA leaders to advance policy and practice that supports NEA's mission, vision, and core values to advance a racial, social and economic justice agenda.	\$ 704,204	\$ 717,114
	<ul style="list-style-type: none">• Provide research, resources, counsel and expertise to NEA Governance leaders to continue to build strategic relations with Civil Rights (Hispanic, African American, Asian Pacific Islander American Indian, and Alaskan Native), progressive, and community partners and education stakeholders at the national, state and local level in order to advance a student centered agenda that leads to empowered educators. This includes supporting NEA governance with engagement of minority principles.• Provide resources, counsel, and expertise in response to standing committees and governance requests.		
		Direct Cost:	48,985,167 48,985,167
		Personnel Cost:	9,804,314 10,001,663
		Total:	\$ 58,789,481 \$ 58,986,830

Core Function 4: Communications—Utilize the best communication strategies to advance the organization’s mission and vision by understanding key audiences, engaging state and local affiliates, members, partners, parents and communities, coordinating message development and delivery across the Association, and enhancing the Association’s brand and reputation.

Identified as an important shared priority between NEA and the State Affiliates, the Communications Core Function provides integrated, full-service communication services that support the work of the Association’s Strategic Goals and the Center’s core operations in order to more effectively reach and engage all key audiences. Scalable, customized communications, with applicability and utility for affiliates, are a critical component of this work.

The Center for Communications seeks to position NEA leaders and members as the credible, leading voice for students and public education and works to engage members and the public to support the strategic initiatives of the Association. An array of communications tactics and activities are embedded in the top priority areas of the Strong Affiliates and Empowered Educators goals. They include comprehensive strategies to support Strong Affiliates in state battles and electoral campaigns, federal, state and local political engagement, activist engagement, and state capacity building. In support of Empowered Educators for Student Success, integrated communications campaigns are developed to amplify our work to drive educator-led, student-centered solutions; to empower educators to improve teaching and learning conditions and to maximize internal and external partnerships.

Campaigns and Advocacy: Supporting the strategic initiatives led by the Center for Advocacy and Outreach on NEA issues and legislative goals that support great public schools for our members and their students; human rights, as well as social and economic justice issues that reflect NEA’s commitment to equal opportunity and a just society.

Empowered Educators and Student Success: A focus on multi-level communications strategies, leveraged resources, and tools to build capacity among members, state and local affiliates to increase member engagement and activism driving educator designed and developed policies that improve the quality of education for all students.

Public Brand and Engagement: This area is designed to leverage special projects and events that enhance NEA’s reputation among the public and engage members, as well.

Affiliate Engagement and Capacity: Provide affiliate communications support, training, and services to strengthen affiliate communications capacity.

Organizing Communications: Provide integrated strategic and tactical communications support for NEA and affiliate organizing campaigns, including building capacity in state affiliates and creating innovation in online organizing and member engagement.

Communications Operations: The Center’s core operational units work together to create cross-Center and cross-Association teams that produce effective integrated communications’ campaigns and tools designed to deliver key messages that resonate with members and external audiences. Operational teams include Media Strategy, Message and Intel, Integrated Campaigns, Digital Engagement, Publications and Editorial, Creative Services and Business Operations.

Core Function 4: Communications

1	Campaigns and Advocacy	2016–2017	2017–2018
1	<p>Develop national communications strategies, resources, and tools to build capacity in state affiliates and partner with them in their efforts to conduct political, legislative, and issue campaigns that increase the quality of member engagement, member training, and member activism while seeking legislative outcomes that support great public schools, sustainable organizational power, affiliate capacity and educate the public about their proactive efforts to support public education.</p> <ul style="list-style-type: none">• Develop messaging and media strategy in collaboration with field staff and state affiliates, supporting legislative and issues campaigns important to NEA. This includes state and local support and capacity building as well as working to recruit, organize, train, and mobilize member activists to advance Association priorities.• Develop, execute, and win electoral campaigns through messages to members and the public using members’ voices, third party validators, digital media, and paid and earned media. Develop and implement a timely and strategic program for NEA around the election, transition and inauguration of the next Administration and strategically align opportunities for NEA priorities.• Recruit, engage, and prepare members to take action in political, legislative, and legal campaigns. Work to enhance message effectiveness in grassroots activities and legislative advocacy. Work with state affiliates in development and deployment of member leaders, messengers and activists who can support advocacy efforts.• Support NEA’s advocacy campaigns on human rights, social and economic justice issues that reflect NEA’s commitment to equal opportunity and a just society with great public schools for every student.	\$ 1,273,292	\$ 1,292,657

Core Function 4: Communications

2 Empowered Educators and Student Success		2016–2017	2017–2018
1	<p>Develop multi-level communications strategies, leverage resources, and tools to build capacity among members, state and local affiliates to increase member engagement and activism driving educator designed and developed policies that improve the quality of education for all students.</p> <ul style="list-style-type: none"> In collaboration with NEA's cross-Center and affiliate staffed, National ESSA implementation team, advise, develop, execute and share a full suite of communications tools, utilizing partners, NEA leaders and members, reaching parents, policy makers, members and the media to help affiliates and support at a national level, efforts to drive student centered policies to boost achievement, help struggling schools, address and correct gaps in equity, supported and designed by educators from opportunities tied to ESSA. In conjunction with C4O and the ESSA implementation team, share customizable resources and assist in the execution and delivery of a comprehensive suite of communication tools to advance educator-driven and designed policies to enhance student learning and improve struggling schools. Working closely with at least five state affiliates, and the ESSA Implementation Team, developing and executing a comprehensive communications program in support of taking advantages of the opportunities in ESSA and passing pro-student, educator developed policies leveraging the voice of members and affiliate leaders. 	\$ 662,718	\$ 671,539
2	<p>Design and execute strategic multi-disciplinary communications campaigns that advance the Association's growth and servicing of members' needs as they progress through their career continuum through the use of up-to-date research, planning, outreach, messaging, social, owned and earned media.</p> <ul style="list-style-type: none"> In collaboration with the CGPS, tell the story of members and affiliates driving quality of the professions as member's progress along the career continuum for the betterment of students and setting the standard of quality and excellence for educators. 	339,823	343,912
3 Public Brand and Engagement			
1	<p>Plan and execute special projects and events that strengthen the NEA brand and reputation among the public and engage members.</p> <ul style="list-style-type: none"> Maintain the national media and digital presence for Read Across America (RAA) and assist states and locals in creating and leveraging their RAA events (including the 20th anniversary) to further the Association's student-centered, Association-led goals and organizing efforts. Plan and create promotions and materials that further the Association's brand and public reputation as related to National Teacher Day/Appreciation Week and ESP Day. Provide state and local affiliates with tools and resources to produce branded events. 	789,400	797,577

Core Function 4: Communications

4 Affiliate Engagement and Capacity	2016–2017	2017–2018
<p>1 Provide affiliate communications strategic support, training, and services to strengthen affiliate communications capacity.</p> <ul style="list-style-type: none"> • Implement a coordinated, strategic approach to the Association’s communications efforts with state and local affiliate communicators resulting in an Association-wide shared communications plan. Utilize the PR Council of the States and State Education Editors organizations to further integrate the work of state communicators with that of NEA Communications. Provide communications counsel and support to state communicators. • In support of state affiliates and members, develop and deliver written tools, including message guidance, training materials, and delivery of message, and media training via webinars or in person training with local affiliates, state affiliates, members, partners, affiliates and/or surrogates. • Provide rapid response communications support to affiliates during moments of crisis. Serve as liaison between affiliates’ communication staff and NEA during a crisis situation and provide integrated communications strategy and support. • State Affiliate Advertising Grant. 	\$ 4,155,077	\$ 4,161,533
5 Organizing Communications		
<p>1 Provide communication capabilities assessment, strategic planning, personnel training, product production, campaign execution support, and campaign performance analysis support for NEA and affiliate organizing campaigns.</p> <ul style="list-style-type: none"> • Work with C4O managers to plan, develop, execute and analyze communication activities for NEA and affiliate organizing growth campaigns. Additionally we will plan, develop, produce, deploy, and analyze multimedia and online communication products and services to support NEA and affiliate issue organizing growth campaigns. • Work with C4O managers to plan, develop, execute, and analyze communication activities for NEA and affiliate issue organizing campaigns. Additionally we will plan, develop, produce, deploy, and analyze multimedia and online communication products and services to support NEA and affiliate organizing campaigns. • Work with state and local affiliates to provide temporary strategic and on site help to move communications campaigns on priority issues or organizing efforts. Additionally we will provide strategic planning, coordination of materials and message. 	904,071	916,553

Core Function 4: Communications

6	Communications Operations	2016–2017	2017–2018
1	<p>Influence the national and local media debate on public education and raise member and leader voices by leveraging and creating media opportunities and building and maintaining strong relations with earned media including print, online, and broadcast news media, education writers and editors, bloggers, and opinion writers. Also provide media training to Association leaders and spokespersons.</p> <ul style="list-style-type: none"> Develop, conceive, and execute comprehensive media strategies and events that leverage leadership and member voices in support of the Association's efforts targeting national, state, and regional media across all platforms. Raise the voice of the NEA President on the national and local stage. Establish tools, systems and training to support an effective media strategy operation including list databases, analytics and technology. Provide media training for NEA leaders, members, and staff. 	\$ 747,387	\$ 756,855
2	<p>Plan and execute strategic communications initiatives for NEA projects, initiatives and programs by managing multiple tactics, including paid media, strategic partnerships, sponsorships, and special events across the Center.</p> <ul style="list-style-type: none"> National Media Fund. Plan, execute and evaluate paid media and campaigns on behalf of the Association and in coordination with state affiliates, partners, and allies. 	14,102,732	14,105,745
3	<p>Provide a full range of conceptual and strategic planning from traditional and interactive design to film, pre and post production as well as using popular culture and the arts as a tool to engage NEA HQ, affiliates, and partners to fund an infrastructure necessary to effectively support mission-critical communications.</p> <ul style="list-style-type: none"> Develop and disseminate creative and strategic content, graphic design, templates and other resources in support of state and local battles and campaigns. Introduce streamlined content management and sharing practices to leverage affiliates' ability to employ cutting edge, profession-related art, stock images, infographics and motion graphics. Provide NEA HQ with a full range of creative, conceptual and strategic graphic design, film production, video editing, art direction and staffing to ensure high-quality materials and mission-critical communications in an ever changing environment. 	2,454,437	2,495,540
4	<p>Plan, develop, produce, and deploy and sustain digital engagement strategies and products in support of NEA strategic priorities.</p> <ul style="list-style-type: none"> Establish strategy, infrastructure and trainings to support digital advocacy and organizing including online organizing platforms, social media advocacy and online paid promotions. Perform needs assessment, conceptual planning, design, production, and maintenance services for NEA Web sites, mobile application, Internet Technology and emerging digital engagement products and platforms that facilitate a non-stop effort to engage, inform, support, mobilize, and activate NEA members and public audiences. Support the development and scaling of key digital engagement infrastructures including email platform, content management, text messaging, and listening and analytics tools. 	1,816,321	1,837,411

Core Function 4: Communications

6	Communications Operations	2016–2017	2017–2018
5	Research, write, edit, design, and provide editorial content in print and digital media to engage members and communicate Association key messages.	\$ 5,574,612	\$ 5,605,817
	<ul style="list-style-type: none"> • Advance the Association’s mission, vision, and goals with editorial content in <i>NEA Today</i> to members, education and labor media, policymakers, opinion leaders, and state affiliate communicators in print and digital formats. Expand <i>NEA Today</i> co-publishing with state affiliates in a shared cost fashion. • Advance the mission, vision, and goals of the NEA Student Program in <i>NEA Today for Future Educators</i> to prospective and current student members and association leadership and staff in print and digital platforms. • Provide editorial content in <i>NEA Today-Retired</i> to prospective and current NEA Retired members, education and labor media, policymakers, opinion leaders, and state affiliate communicators in print and online platforms. • Provide editorial content in <i>The Higher Education Advocate</i> to prospective and current higher education members, education and labor media, policymakers, opinion leaders, and state affiliate communicators in print and digital platforms. • Provide editorial content in <i>Thought & Action</i>, the higher education review journal in digital and online platforms. 		
6	Develop and execute strategic communications programs to engage delegates, members and external audiences during the Representative Assembly and provide communications support for internal clients.	842,179	851,218
	<ul style="list-style-type: none"> • Execute strategic communication programs at NEA’s Representative Assembly. 		
	Direct Cost:	24,853,936	24,853,936
	Personnel Cost:	8,808,113	8,982,421
	Total:	\$ 33,662,049	\$ 33,836,357

Core Function 5: Business Operations—Administer the business operations in a manner that supports the changing needs and priorities of the organization by ensuring efficient and effective infrastructure and sound strategic and fiscal management, leveraging technology, and strengthening the Association’s human capital.

NEA’s infrastructure, facility services, human resources, technological tools, legal services, and financial management reside in this area. This Core Function also handles improvement and innovation initiatives, strategy development, workplace culture initiatives, business development, financial analyses and risk management, and the integration and leveraging of systems and technology.

Work that will receive significant visibility in the next planning and budget cycle includes the design and implementation of a variety of technology projects, including NEA360, a new Travel and Expense module, a Grants tracking system, a Partnership data project and upgrading the Human Resources Information System. Legal issues will continue to be high impact work, along with workforce planning and skills training at all levels of the NEA and state affiliates. Long-term strategic and financial planning is also essential to maintaining the Association’s financial health and meeting future challenges.

Financial and Legal Support: Financial analysis and risk management with an emphasis on affiliate fiscal health. This area provides business intelligence, technical support, training, budget planning and development, as well as comprehensive support for membership management services including alternative dues collection (eDues). Legal advice, assistance, and litigation services provided to affiliates on issues of cross-cutting national significance, including evaluation and tenure reforms, payroll deduction roll-backs, vouchers, evaluation privacy, as well as, ongoing assistance on labor relations, individual rights, education reform, political activity, and other legal matters.

Human Resources Operations: Key initiatives in this area focus on benefits, recruiting, and effectiveness in strategic workforce planning to align the organization’s human capital with its priorities. It also seeks to align the workplace culture with NEA’s vision and strategy.

Infrastructure and Organization Support: This area manages resources to effectively advance the Association’s strategic goals and core functions, while aligning and leveraging resources to promote innovation, adaptability, operational efficiencies, and effectiveness.

Organization and Strategy Development: NEA’s strategy is developed in this area and operations are aligned through strategy development and review processes that support decision making, promote organizational learning, create alignment and effectiveness, and promote innovation.

Technology: Technology is a key driving force in changes taking place across the globe and maximizing its use requires attention to aligned policies and procedures, standards, training, data availability/security for NEA, affiliates, and related or allied organizations.

Facility Services, Logistics, and Support: Key efficiencies include increasing NEA headquarters’ energy efficiency; creating a workplace that supports a 21st century workforce; plus restructuring conferences and consolidating business processes, such as travel and catering, for improved results at reduced costs.

Core Function 5: Business Operations

1	Financial and Legal Support	2016–2017	2017–2018
1	Systems and Data: Provide ongoing support for NEA and affiliates through the deployment of Association business systems and software applications. <ul style="list-style-type: none"> Maintain and enhance financial systems and related business processes to improve NEA and affiliate efficiency in recording and reporting financial transactions in accordance with appropriate standards and regulations. Maintain and enhance membership systems to ensure accurate and timely processing of membership transactions in accordance with membership policies. 	\$ 816,012	\$ 830,216
2	Promote NEA and affiliate fiscal health through training and advisory services for staff and governance that enhances their ability to conduct Association business and meet regulatory requirements. <ul style="list-style-type: none"> Assist NEA and affiliates by providing financial analysis and advice, financial management reporting and training, newsletters, and other communications including updates on specific regulatory and business management issues. Assist NEA and affiliates by providing membership analysis and advice, membership reporting and training, newsletters, and other communications including updates on specific membership issues. Process the Association's membership transactions and financial obligations and provide accurate and timely financial and membership reports and analysis to support NEA business operations. Process the Association's transactions, financial compliance, obligations and provide accurate and timely financial, fiduciary, and regulatory reports to support NEA business operations. Process transactions and provide comprehensive reporting for the NEA Fund for Children and Public Education (NEA Fund) to ensure accurate recordkeeping and regulatory compliance. 	10,078,545	\$ 10,152,144
3	Manage and project the Association's finances by monitoring revenues and expenditures and analyzing factors that affect revenue streams and cause expenditure variances. <ul style="list-style-type: none"> Manage the agency fee activities which include coordinating the agency fee audit, preparation of Hudson Notices, and attending agency fee hearings as needed. Provide financial analysis to governance and executive management. Provide fiscal planning, forecasting, and assistance in developing Association budgets. 	1,277,931	1,297,725
4	Reduce loss and increase efficiency by executing a comprehensive risk management program that includes audits, compliance monitoring, and information security. <ul style="list-style-type: none"> Execute a comprehensive internal auditing program. 	371,876	377,901

Core Function 5: Business Operations

1	Financial and Legal Support	2016–2017	2017–2018
5	<p>Provide legal advice, counseling, agency fee support and support for the NEA Fund for Children and Public Education and Federal Election Commission matters.</p> <ul style="list-style-type: none"> • Ensure 100 percent of agency fee support is error free and provided within established guidelines. • Maintain the National Organization of Lawyers for Education Associations (NOLEA) group site as a resource and communications network for attorneys nationwide, organize annual meeting of NOLEA attorneys, provide NOLEA attorneys with resources and analysis on cross-cutting issues of significance such as social media guidance, evaluation privacy, challenges to vouchers, and challenges to payroll deduction cutbacks. • Provide legal and policy support to governance (e.g., Executive Committee, Board, Constitution, Bylaws, Resolutions, etc.) at the national and state levels. • Provide policy support to the NEA Fund for Children and Public Education and Federal Election Commission matters. • Provide representation, advice, memoranda, briefs, and oral arguments for NEA, affiliates, and members on various legal matters including, (i) amicus work in cases of significance before the Supreme Court and state Supreme Courts; (ii) several affirmative strategic litigation initiatives to advance the interests of NEA, its affiliates and members (such as, challenges to tenure repeals, evaluations based primarily on standardized test scores, voucher programs, and payroll deduction cutbacks), and (iii) the defense of NEA and its affiliates in pending litigation. 	\$ 2,753,168	\$ 2,787,383
2	Human Resources Operations		
1	<p>Workforce planning including position control, recruitment, internships, and Human Resource partner consulting.</p> <ul style="list-style-type: none"> • Manage position control, classification costs, and all other workforce costs and their effect on the personnel line. Develop and analyze NEA's personnel cost modules and review the accuracy of costs for Management and provide recommendations for actions to effectively anticipate and budget for changing benefit programs cost. • Perform recruitment, promotion, salary calculations, placements, and classifications that are consistent with NEA guidelines and meet the current and projected staffing and racial equity needs of the NEA. • Provide consulting services to assigned goal and core leads or designees on Human Resource related services. Provide training and departmental consultations to ensure timely completion of the organization-wide performance management review process. 	6,518,980	6,540,334

Core Function 5: Business Operations

2	Human Resources Operations	2016–2017	2017–2018
2	Manage Human Capital operations including labor relations, payroll, benefits, performance management, and NEA staff’s collective bargaining agreements. <ul style="list-style-type: none"> • Coordinate and monitor procedures for timely completion of all benefit plan audits and compliance standards. Prepare and file annual reports to the Department of Labor (DOL), Internal Revenue Service (IRS), and other regulatory agencies. • Coordinate integration of and maintain all Human Resource Information Systems. Ensure accuracy of personnel files throughout the various stages of the employment cycle. Benchmark strategies for integrating technology with Human Resources business practices. Manage reporting and data analysis of employee information to ensure compliance with federal and state regulations; and to provide Affirmative Action Report. Maintain electronic or paper records for all employees and retirees. • Deliver staff education and administer professional development and tuition reimbursement funds to offer learning opportunities for professional development, and training in critical skills in alignment with organizational goals. Ensure compliance with established Department of Labor policies and collective bargaining agreements. • Design and manage a broad benefits program for employees, retirees, and some state affiliates that include health and welfare benefits, a defined benefit pension plan, and 401(k). Maintain working relationships with benefit providers to provide on-going access to quality, cost-effective health and medical coverage. Ensure compliance with Employee Retirement Income Security Act (ERISA) federal legislation and contractual obligations related to the organization’s defined benefits plan. Monitor other supplemental programs for the Officers, Executive Committee members, Student Chair, and the Executive Director. • Ensure compliance with payroll legislation and tax laws. Reconcile payroll data and administer record keeping and verifying the reliability and accuracy of all the payroll processes. • Maintain interest-based labor relations program. • Provide and promote a comprehensive wellness program to improve employee health and morale. Perform workplace health assessments to ensure programs are aligned with the organizational wellness strategy. 	\$ 3,439,821	\$ 3,490,606
3	Develop NEA’s workplace culture to foster a workforce inspired to achieve NEA’s vision and strategy. <ul style="list-style-type: none"> • In collaboration with staff unions, foster employee engagement to maintain organizational effectiveness and positive workplace morale. • Provide coaching, mentoring, and facilitation support to promote teamwork and positive working relationships. 	730,060	740,820

Core Function 5: Business Operations

3	Infrastructure and Organization Support	2016–2017	2017–2018
1	Lead, direct, and align NEA's programs and services by engaging staff and managing resources to effectively advance the Association's strategic goals and core functions. <ul style="list-style-type: none"> Provide departmental infrastructure and organizational support to effectively realize the Association's strategic goals and core functions. 	\$ 11,135,566	\$ 11,290,074
4	Organization and Strategy Development		
1	Facilitate the development of NEA strategy and align both strategy and operations. <ul style="list-style-type: none"> Conduct learning and progress review processes on the NEA Strategic Plan to reflect on accomplishments and align our tactical strategy to the long-term strategy. Conduct on-going Strengths, Weaknesses, Opportunities, and Threats (SWOT) analyses that examine the forces affecting NEA, its affiliates, and public education to determine organizational opportunities and threats to achieving our vision and priorities. Convene NEA leaders/staff and provide facilitation and/or strategic advice for the ongoing stewardship of NEA's mission, vision, and core values. Advance vision for educator empowerment through transformation dialogues and other collaborative activities both internally and externally. Identify and articulate the processes that support and sustain educator empowerment as well as those used to ready educators for empowerment roles. Suggest strategic opportunities to NEA and its affiliates to disseminate best practices in educator empowerment. Improve strategic systems to enhance leaders' ability to make informed programmatic, policy, budgetary, and business decisions that are aligned with NEA strategy. Lead the overall execution of organizational strategy and ensure operational alignment and outcomes. 	2,718,199	2,754,784
2	Support the NEA and departments to ensure efficient and effective administration of resources. <ul style="list-style-type: none"> Administration, support, and operations planning. Insurance policies. Purchasing and Procurement. 	\$ 3,005,715	\$ 3,053,058

Core Function 5: Business Operations

5	Technology	2016–2017	2017–2018
1	<p>Build a solid foundation of IT infrastructure that provides reliable, agile, and flexible IT service choices while optimizing NEA's IT investments. Manage, adopt, and promote the use of using shared, common web-based services, data, and technology architecture and standards to NEA enterprise system/applications, affiliate services, NEA Member Benefits, and external partners.</p> <ul style="list-style-type: none"> • Manage the availability, usability, integrity, and security of the data employed in an enterprise. Organize tasks and resources across projects, and manage and support NEA, NEA Member Benefits, state affiliates, and other entities in support of office applications, Association foundation applications and technical support. • Provide IT related management, support, development and staffing for events including State Technology Coordinator Co-op, Technology Compact Committee, Work Groups, Summit, Representative Assembly, or other Association activities. 	\$ 910,170	\$ 917,917
2	<p>Effectively direct resources for overall design, development, modernization, and maintenance of a robust central computing center. Develop an infrastructure flexible enough in its architecture to respond to innovation and the changing needs of the NEA.</p> <ul style="list-style-type: none"> • Datacenter and Core Services: Develop and maintain NEA's datacenter and core services including directory services, backups, and monitoring. • Networking: Support NEA's LAN, WAN, Wireless, and Internet connectivity to support NEA headquarters and affiliates. • Operations: Operations of cyclical processes (nightly, weekly, monthly, yearly). Coordination of necessary operational processes to fulfill the functional needs of the Association and affiliates. • Servers and Storage: Build, maintain, and explore a service architecture that increase fault tolerance for servers and storage wherever located. 	4,817,069	4,862,262
3	<p>Provide standardization and improve IT Service Level Management for all consolidated and enterprise-based services, to achieve improved service outcomes, and demonstrate accountability. Adoption of common service management processes, tools and metrics in order to coordinate support, management, and reporting.</p> <ul style="list-style-type: none"> • Hardware Support: Hardware life-cycle support refers to all the processes, tasks and people required to keep standard issued devices functional and maintain user productivity during the lifetime of PC hardware and software. The life cycle services start just before the PC acquisition phase and continue through disposal and transition to the replacement platform. Standard issued devices are desktops, laptops, tablets, mobile, desk phones, printers, monitors, and other miscellaneous items. • Product Support: Maintaining product agreements of various enterprise applications, specifically managing support cost, licensing, administration and technical support. The product life-cycle support will provide a consistent and predictable framework for support, available when a product releases and maintain throughout that product's life. 	3,438,558	3,485,902

Core Function 5: Business Operations

5	Technology	2016–2017	2017–2018
4	<p>Secure NEA's IT infrastructure and enterprise systems by safeguarding the integrity of information resources and privacy of its communities. Provide the means to achieve the level of information protection driven by the business needs supported by policies, standards, procedures, and the technical architecture and tools. Define and implement a consistent approach that meets legal and regulatory requirements relating to confidential and/or personal information (PI).</p> <ul style="list-style-type: none"> • Manage a departmental IT quality testing assurance program as part of a coordinated enterprise applications program. Develop clear and forceful policies, standards and procedures to address the integrity of enterprise applications and source code. • Manage a departmental IT security program and perform security audits as part of a coordinated enterprise security program. Develop clear and forceful policies, standards, and procedures to address the integrity (management and protection) of information (data) and the security of IT infrastructure and enterprise systems resources on which that information resides. • Report and document IT security incidents, and monitor compliance with it, and serve as the department's principal IT security contact. 	\$ 1,283,205	\$ 1,294,827
5	<p>Provide sound information systems featuring a rich set of applications and tools that address the increasing need for more effective and efficient processes and provide for advanced analytics. As applications are either deployed for the first time or replaced, they should employ standards-based technologies that will integrate with emerging technologies for continued accessibility.</p> <ul style="list-style-type: none"> • Custom application development: build, maintain, and support custom NEA solutions to unique business problems. Custom development will be focused on meeting requirements unique to the NEA where no commercial solution is available. • Database and data: administer and maintain the databases underlying NEA applications and reporting systems. Provide report writing expertise and support NEA staff and affiliates. • Operations, project management and administration: provide support for and maintain enterprise applications, whether Commercial off the shelf (COTS) or custom. This will be an increasing proportion of the work of the enterprise system's group as NEA moves towards Software as a Service (SAAS) solutions. • Web development and delivery: build, maintain, and administer NEA's web presence and hosted sites, whether on premises or externally hosted. Continue to provide hosting and support for NEA affiliates as requested. 	5,640,033	5,688,885

Core Function 5: Business Operations

6	Facility Services, Logistics and Support	2016–2017	2017–2018
1	Implement building projects that improve NEA’s infrastructure, and continue to make NEA a green environment. <ul style="list-style-type: none"> • Create more productive and efficient physical working spaces that effectively use innovative office systems, maximize existing space, complement changing work styles, and contribute to employee efficiency and morale. • Undertake activities to ensure the maintenance of our Green Building Certification, reduce energy consumption and waste, and to further “green” our workplace. 	\$ 336,900	\$ 339,481
2	Manage NEA facilities, business continuity and risk management, meeting logistics, and print media production. <ul style="list-style-type: none"> • Conference and Travel Services: Consult, plan, and contract with vendors to support NEA meetings held in the NEA building and in off-site locations. Assist in special events planning. Oversee NEA’s café/catering service and travel agency. • Develop sound practices pertaining to business continuity, crisis management, risk management, insurance, safety, and security programs. Design and implement a comprehensive business continuity program and conduct training for headquarters staff on safety procedures. • Facility Services: Provide a clean, safe and healthy working environment for NEA building occupants. Maintain and upgrade the building related assets of the organization. Plan, develop, and implement energy conservation programs to reduce utility cost and maintain our Energy Star rating and Green Building Certification. • Provide for the ongoing logistical and facilities coordination of the Annual Meeting. Assess and implement new strategies, tools and improvements to enhance the efficiency, effectiveness, and engagement of delegates at the NEA Representative Assembly. • Provide property management services for the spaces at NEA HQ that NEA leases to other organizations. • Provides cost-effective and efficient printing, mailing, shipping and receiving services to NEA HQ, affiliates, related organizations and other constituents. 	13,468,226	13,586,148
		Direct Cost: 28,380,978	28,380,978
		Personnel Cost: 44,359,056	45,109,489
		Total: \$ 72,740,034	\$ 73,490,467

Core Function 6: Governance—Develop and maintain leadership development and decision-making structures and processes across the Association and its affiliates that clearly advance the organization’s mission and vision.

It is critical that NEA’s leaders have solid policy and content guidance, as well as, innovative, efficient, and reliable business support; leadership development; and strategic opportunities needed for effective decision-making and influential leadership.

This Core Function’s work will be prioritized in a number of ways to help facilitate effective governance and leadership. A greater degree of focus on positioning NEA leaders based on key audiences and topics that are targeted within the strategic goal areas, in order to align and integrate activities that relate to one another and reinforce the organization’s goals. This work will be undertaken with the goal of improving group dynamics and information sharing within and between governance groups, committees, and councils. There will be a specific priority focus to identify and implement training opportunities to help NEA governance and appointed bodies meet the demands of leading in a complex and fast-changing environment with shifting and unpredictable resources. Additionally, NEA has some of the largest and most complex governing structures of any organization in the world. Supporting these structures effectively and efficiently requires a constant focus on innovation and self-evaluation. This will be part of the prioritized and ongoing work necessary to ensure that NEA has sound governance infrastructures and policies that will serve the organization well into the future.

Governance for the 21st Century: This area is charged with assessing NEA’s governance and facilitating and supporting informed decision-making from NEA’s governance bodies.

Committee and Council Coordination: Facilitating well informed deliberations from the Standing and Advisory Committees and providing operational assistance to constituency councils is the purview of this area.

National and Global Leadership Engagement and Influence: Assuring that strong Association leadership voices are prioritized and heard in venues most likely to advance the Associations’ goals is a primary focus, along with facilitating NEA’s influence in the international labor and educational arenas.

Competency-Based Leadership Development: Using a holistic approach, while seeking to rationalize the current balkanized system of leadership development activities into a system that prepares Association leaders with the knowledge, skills, and abilities required to guide the Association into its future.

Core Function 6: Governance

1	Governance for the 21st Century	2016–2017	2017–2018
1	Governance for the 21st Century: Support, assess, implement, and align NEA governance policies and procedures to ensure that the Association has the decision-making structures and processes to significantly advance NEA's mission, vision and core values. <ul style="list-style-type: none"> Actively review NEA's policies to ensure that the organization has the procedural and structural capacity to grow and strengthen membership pursuant to membership strategies. Conduct organizational self-assessment survey and gather member and governance feedback regarding representation, functions, and design of NEA governing bodies. Design and build components in an electronic policy library that collect, categorize, and archive all adopted policies and related decision making in support of their implementation and interpretation. Produce and codify comprehensive analyses of prioritized policies and make recommendations to governance as appropriate. Manage and align the work of NEA's official governing bodies and advisory committees; support internal and state/local affiliate requests for assistance with policy development, analysis, interpretation, and research. Provide analysis and interpretation of Association policies; monitor compliance with Association policies. 	\$ 669,610	\$ 682,522
2	Engage, support, and align well-informed decision making by the Executive Officers and Committee to advance the organization's present and anticipated needs. <ul style="list-style-type: none"> Executive Committee Benefits Executive Committee Official Meetings Executive Committee Release Time Executive Committee Support Services Executive Committee Travel Executive Officers' Benefits Executive Officers' Living Allowance Executive Officers' Salary Executive Officers' Travel Official NEA Representation 	3,919,650	3,934,714
3	Facilitate, support, and align well-informed decision making by the Board of Directors that meets the contemporary and future needs of the organization. <ul style="list-style-type: none"> Board of Directors: Benefits Board of Directors: Governance Representation Board of Directors: Instate Expenses Board of Directors: Internal Committees Board of Directors: Official Meetings Board of Directors: Substitute Pay/Salary Loss Board Travel: National Conferences 	3,263,499	3,273,182

Core Function 6: Governance

1 Governance for the 21st Century		2016–2017	2017–2018
4	Engage, support, and align well-informed decision making by the Representative Assembly that meets the contemporary and future needs of the organization. <ul style="list-style-type: none"> • Committee on Constitution, Bylaws, and Rules • Committee on Program and Budget • Convention Guests • Credentials Committee • Elections Committee • NEA Retired Meeting • RA Governance and Policy Administrative Support Services • RA Today/Delegate Communications • Resolutions Committee 	\$ 1,547,110	\$ 1,555,717
2 Committee and Council Coordination			
1	Engage, support, and align well-informed deliberations of appointed committees and councils. <ul style="list-style-type: none"> • Committee Implementation Reports and Administration • Financial Support for National Council for Education Support Professionals • Financial Support for National Council for Higher Education • Financial Support for NEA-Retired Executive Council • Standing Committees 	555,815	560,119
3 National and Global Leadership Engagement and Influence			
1	Engage the voice of Association leadership to align highest organizational priorities and relationships that best advance NEA's goals <ul style="list-style-type: none"> • Engage multiple content departments, develop content briefings and guidance, and develop salient talking points. • Engage multiple departments and strategic goal areas, develop and place topical, timely and well-thought out opinion pieces in strategic print and Web properties; as well as public hearing testimony, letters to editors, blogs, and other social media content written under the President's by-line. • Information Forums and Town Halls, webcasts with Board, Delegates, and state leaders. • President/Executive Director internal meetings. • Produce written deliverables from the Office of the President including detailed meeting and video scripts, correspondence with members, affiliates, influentials, and governance materials generally (such as, policy documents, meeting minutes, reports, and memos). 	653,958	666,870

Core Function 6: Governance

3	National and Global Leadership Engagement and Influence	2016–2017	2017–2018
2	<p>Engage and support leadership initiatives that strengthen NEA’s alliances with U.S. and international labor unions.</p> <ul style="list-style-type: none"> • Develop and sustain partnerships with Education International (EI) affiliates, other national teacher unions, global labor federations, and international organizations and networks to advance NEA’s brand and influence global education debates that have domestic effects. • Engage, participate, and support EI and its affiliates to advance NEA’s mission, vision, goals, and core values. Manage the profile of NEA’s leadership presence and representation in EI. • Identify, systematize, and disseminate best education policies and practices, from other countries, throughout the Association and its state affiliates. • Provide policy counsel as to relationships with other labor leaders and organizations, including jurisdictional agreements and shared-member markets. 	\$ 968,121	\$ 982,107
4	Competency-Based Leadership Development		
1	<p>Develop, identify and deliver content and experiences that will effectively impart NEA leadership competencies and prepare leaders with the knowledge, skills, and abilities necessary to lead relevant and thriving Associations. Partner with affiliates to align competency-based leadership development priorities, programming, and leverage collective resources.</p> <ul style="list-style-type: none"> • Develop and implement assessment of existing NEA and affiliate leadership development activities, structures, and results in order to enhance quality, reach and effectiveness throughout the Association. • Enhance systems of engagement between NEA’s leadership competencies and NEA membership. Provide content and online learning materials from Summit and other sources that support the competencies. Track member exposure to and usage of NEA and affiliate content and events. Align and connect leadership development across NEA programs and departments. 	741,714	753,550
2	<p>National Leadership Summit: Develop, identify, plan, and deliver content and experiences that will effectively impart NEA leadership competencies and prepare leaders with the knowledge, skills, and abilities necessary to lead relevant and thriving Associations.</p> <ul style="list-style-type: none"> • Conduct planning meetings for the purpose of designing national leadership summits. • Deliver one annual National Leadership Summit that is based upon the NEA leadership competencies and that serves to identify activist leaders and prepare them with the knowledge, skills, and abilities necessary to lead relevant and thriving Associations. Coordinate with state and local affiliates to enhance assessment of participant activism following each Summit. 	2,053,408	2,067,396

Core Function 6: Governance

4	Competency-Based Leadership Development	2016-2017	2017-2018
3	<p>Deliver and coordinate competency-based learning opportunities for leaders to ensure that they are equipped with the knowledge, skills, and abilities to be effective in the roles in which they serve. Develop and identify content and experiences that will effectively impart NEA Leadership Competencies and prepare leaders with the knowledge, skills, and abilities necessary to lead relevant and thriving Associations. Enhanced focus on providing technical assistance to state and local affiliate leaders to assist with leadership development tactics and activities that are aligned with NEA priorities.</p> <ul style="list-style-type: none"> • 3-1(g) Workshop • Design and deliver competency-based content and experiences for State Affiliate Vice Presidents. • Implement NEA Board training to enhance overall knowledge, skills, and abilities for NEA Directors. • Increase the conference alignment team's efforts to engage in strategic conversations with state and local affiliates to better align and collaborate on leadership development programming and improve access to high quality NEA events and trainings. • New BOD member transformation dialogue. • Partner with NCSEA to provide competency-based content and experiences for State Affiliate Presidents. • Utilize NEA's Leadership Development Workgroup to develop partnerships and align all NEA leadership development activities with the leadership competencies, coordinate all leadership development work, and utilize governance and constituency meetings and events to deliver and model leadership knowledge, skills, and approaches. 	\$ 573,339	\$578,719
	Direct Cost:	9,344,078	9,344,078
	Personnel Cost:	5,602,146	5,710,818
	Total:	\$ 14,946,224	\$ 15,054,896

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Budget Financial Line Item Definitions

Salaries/Fringe Benefits – Salary payments to NEA employees and the provision of benefits such as medical insurance, life insurance, retirement, post-retirement health care, and payroll taxes (Social Security and unemployment insurance.)

Non-Staff Wages – Reflect the salaries of the President, Vice President, Secretary-Treasurer, salaries of state executive directors participating in the Unified State Executive Director Program, and payments for stipends, salary loss, or substitute pay for members of the Executive Committee and Board of Directors.

Travel – Staff – Represents travel expenses incurred by NEA employees on official business, such as transportation, lodging, and meals; travel credit allowances paid for extensive travel in accordance with existing staff contracts or policy authorization; and moving and relocation expenses.

Travel – Non-Staff – Represents travel expenses incurred by non-NEA employees on official business, such as transportation, lodging, and meals. This includes travel expenses incurred by the Executive Committee, Board of Directors, members, state and local affiliate governance, and staff.

State and Local Projects – Grants and approved projects for affiliated organizations, including UniServ grants, Unified Legal Services Program reimbursements, Small States Foundation grants, Great Public Schools funding, and cooperative projects.

Publication Costs – Paper, printing, production, composition, art, and design costs incurred for publications such as *NEA Today* and specialized constituent publications, research papers, and other reports.

Office Expenses – Stationery, office supplies, telephone/communications, photocopy, postage/shipping, and utility costs incurred.

Administrative Expenses – Interest payments to lending institutions for borrowed money, insurance, regional office and warehouse rent, membership/funding to outside organizations, contributions, and depreciation.

Machinery and Equipment – Personal computers, computer accessories, and items such as mailing equipment, calculators, and equipment rental/repairs.

Outside Services – Fees paid for professional legal, audit and tax services, consulting services, and building maintenance. It also includes costs for Educators' Employment Liability insurance premiums, membership forms and cards, promotional materials, and advertising.

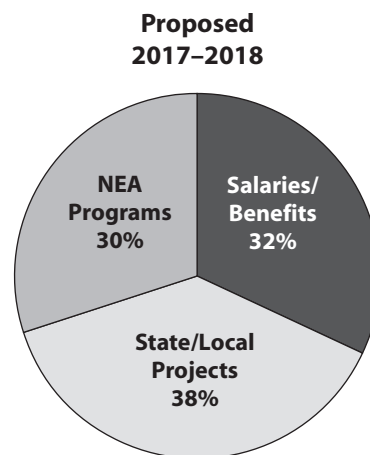
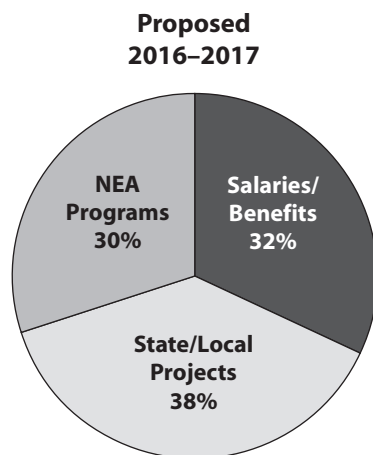
Conference/Meeting Expenses – Facilities, equipment rental, food and beverages, speaker fees, training materials, teleconferencing, and video conferencing.

Recovery – External – Funds received from NEA affiliates (such as expense reimbursements) and from sources outside the Association.

Contingency Fund – NEA Bylaw requires a contingency reserve of no less than \$1,000,000 and no more than 1 percent of the budget.

Total Budget Comparisons By Line Item

Description	Proposed 2016–2017	Proposed 2017–2018
Salaries/Fringe Benefits	\$ 115,844,193	\$ 117,896,993
Non-Staff Wages	6,055,361	6,055,361
Travel – Staff	7,936,095	7,936,095
Travel – Non-Staff	12,260,570	12,260,570
State and Local Projects	136,424,667	136,424,667
Publication Costs	4,494,206	4,494,206
Office Expenses	7,331,490	7,331,490
Administrative Expenses	19,400,111	19,400,111
Machinery and Equipment	8,600,652	8,600,652
Outside Services	46,875,361	46,875,361
Conference/Meeting Expenses	8,941,972	8,941,972
Recovery – External	(11,910,278)	(11,910,278)
Sub-Total	\$ 362,254,400	\$ 364,307,200
Contingency Fund	3,000,000	3,000,000
Total Budget	\$ 365,254,400	\$ 367,307,200



Appendix A: Recoveries

NEA General Fund receives funds from its affiliates, external sources and other NEA Special Purpose Funds. These funds represent such items as advertising in NEA publications and reimbursement of funds advanced on behalf of NEA affiliates. The impact of these recoveries are reflected as a reduction of the total cost within the appropriate activity.

No.	Goal/Core Function Description	Category #	Tactic	Description	Adopted 2016–2017	Modified 2017–2018
2	Empowered Educators for Successful Students	1	1	Education Support Professional national conference registration fees	\$ 90,000	\$ 90,000
2	Organizing	1	4	Reimbursements from state affiliates for jointly funded executive director positions	1,165,416	1,165,416
3	Advocacy	2	2	Legal fee reimbursements	975,000	975,000
3	Advocacy	2	3	Reimbursement from state affiliates for eBill maintenance and processing fee cost	66,780	66,780
3	Advocacy	2	3	Educators' Employment Liability and Association Professional Liability reimbursements	825,000	825,000
3	Advocacy	2	5	NEA Joint Conference on Concerns of Minorities and Women registration fees	110,000	110,000
3	Advocacy	2	5	Human and Civil Rights dinner tickets	155,000	155,000
4	Communications	6	5	<i>NEA Today</i> advertising	2,265,000	2,265,000
4	Communications	6	5	Specialized constituency publication advertising	55,710	55,710

(continued)

Appendix A: Recoveries (concluded)

No.	Goal/Core Function Description	Category #	Tactic	Description	Adopted 2016–2017	Modified 2017–2018
5	Business Operations	1	5	National Organization of Lawyers for Education Associations conference registration fees	\$ 25,000	\$ 25,000
5	Business Operations	2	2	NEA Employee Benefit Plans – personnel cost recovery for Human Resources administration	230,000	230,000
5	Business Operations	2	2	NEA Employee Benefit Plans – cost recoveries	40,000	40,000
5	Business Operations	5	1–5	NEA Member Benefits and other Association entities – technology infrastructure support	3,537,372	3,537,372
5	Business Operations	6	2	Annual meeting activities	1,110,000	1,110,000
5	Business Operations	6	2	Print Recoveries	550,000	550,000
5	Business Operations	6	2	Catering and Conference Recoveries	40,000	40,000
5	Business Operations	6	2	Rental Income	77,000	77,000
5	Business Operations	6	2	Transfer from infrastructure Special Purpose Fund	359,000	359,000
6	Governance and Policy	4	2	National Leadership Summit registration fees	<u>234,000</u>	<u>234,000</u>
Total External Recoveries					<u>\$11,910,278</u>	<u>\$ 11,910,278</u>

Appendix B: Highlights of The NEA Foundation's Programs

The NEA Foundation is a public charity supported by contributions from educators' dues, corporations, foundations, and others. We support student success by helping public school educators' work with key partners to build strong systems of shared responsibility. The Foundation **is reaching, yearly, almost three quarters of a million students** through our combined grants to educators programs and systemic initiatives that support union-district collaboration. As an independent philanthropic entity, we bring the voice of the educator to public education policy and reform, ensuring that teachers are the makers of change, not its objects, treated as professionals, capable of self-regulation and accountability.

We believe that developing and strengthening partnerships among **local education unions, school districts, and community organizations** is a powerful force for improving student performance and a vehicle for systemic reform. Our theory of change and corresponding local interventions are based on recent research on effective schools, district redesign, external agent engagement, association capacity, curriculum and instruction, among other related areas. We provide up to \$1.25 million in grant funding to our **Closing the Achievement Gaps Initiative** sites over a five-year period to support their collaboratively and locally-defined strategies to close the achievement gaps in their community. Together, these groups are shaping learning environments and opportunities for all students to achieve at higher levels. The joint planning ensures that implementation effort is owned by all parties—increasing its effectiveness and chances for success.

Our **Institute for Innovation in Teaching and Learning** supports local unions and school district leaders' collaborative efforts to improve education by focusing on a single issue and providing a dedicated coach for technical support to develop a team plan, connecting leaders to a larger community of practice, and sharing online curriculum on issues of labor-management and how to lead change and reform. The Institute consists of teams (local union, district administration, and community members) from across the country. Each has committed to work together toward a common goal: to improve the quality of education for their students.

The NEA Foundation initiative, **Building State Affiliate Capacity**, supports the growth and development of NEA state affiliate skill and capacity around teaching and learning issues helping to make participating affiliates more resilient, nimble, and relevant to the future of public education in their state. For many state and local union organizations, this work represents a significant shift in organizational mission, vision and capability.

Our **19 free online courses** support district and union leadership—and the field as a whole. Our goal is to increase the education community's ability to design and implement reform projects collaboratively. These courses build skill and capacity in labor-management relations, change management, and leadership.

Our **Grants to Educators** support new ideas and practices to strengthen teaching and learning. Our goal is to fund and share successful strategies to educate and prepare students for bright and rewarding futures. We have awarded \$7.5 million over the past decade to fund more than 4,500 grants to public school educators to enhance teaching and learning. We invite all eligible educational professionals to apply for these grants, due **February 1, June 1, and October 15**.

The NEA Foundation's innovation work identifies new opportunities and tests approaches in public education aimed towards preparing all students for college, career and life. Our **Global Learning Fellowship Program** responds to the major forces: automation of jobs, globalization, corporate restructuring of how work gets accomplished and demographic changes which are causing a shift in the knowledge and skills students need. The program builds a structured and collaborative learning experience that supports educators as they acquire global competence skills. Over one year, Fellows are supported by NEA Foundation staff, partners, and other field experts, as they work through online course work, resource guide and webinars, introductory language learning, a two-day professional development workshop, and international field study. Fellows are required to submit and share lesson plans, unit plans, or full curriculum integrated with global competency skills, contributing to an increasing field of knowledge on this topic. They are positioned to lead the profession by advocating for global learning and global competence within their schools, associations, and districts.

In partnership with AT&T, the NEA Foundation supports popular urban farming programs in Milwaukee, WI and New York City, N.Y. to increase inner city students' interest in STEM (Science, Technology, Engineering, and Mathematics). Our goal: provide more students with the skills and knowledge they'll need for 21st century jobs and develop curriculum and instructional content that educators can use to build similar programs nationwide.

Our **Awards for Teaching Excellence** recognize educators whose professional practice and advocacy for the profession are exemplary. Each year, we encourage all NEA state, federal, and direct affiliates to nominate one outstanding educator for the Awards for Teaching Excellence. The prestigious awards recognize and promote excellence in teaching and advocacy for the profession. They also honor public education and the dedicated members of the National Education Association. The online nomination system opens in September. The nomination deadline is May 1. The NEA Foundation's Salute to Excellence in Education Gala is an annual celebration of the men and women who work in America's public schools and of the unique bonds that educators and students share. All recipients of the Awards for Teaching Excellence are honored at the event.

Appendix C: Governance

	Proposed 2016–2017	Proposed 2017–2018
EXECUTIVE COMMITTEE		
Executive Officers' Salaries	\$ 797,902	\$ 797,902
President	\$ 289,286	\$ 289,286
Vice President	254,308	254,308
Secretary-Treasurer	254,308	254,308
Executive Officers' Benefits/Living Allowance/Travel	887,927	887,927
Executive Committee Travel	296,563	298,715
Executive Committee Release Time	543,490	543,490
Executive Committee Benefits	472,684	472,684
Executive Committee Support Services	49,590	49,590
Executive Committee Official Meetings	850,644	863,556
President's Meetings/NEA Reps	20,850	20,850
Total – Executive Committee	\$ 3,919,650	\$ 3,934,714
BOARD OF DIRECTORS		
Official Meetings	\$ 2,162,876	\$ 2,172,559
National Conferences	240,961	240,961
Committees	29,755	29,755
Directors' In-State Expenses	590,555	590,555
Directors' Benefits	250,552	250,552
Total – Board of Directors	\$ 3,274,699	\$ 3,284,382
REPRESENTATIVE ASSEMBLY		
Annual Meeting Administration	\$ 4,948,759	\$ 4,963,393
Resolutions Committee	461,255	464,483
Constitution, Bylaws and Rules	77,553	77,553
Credentials Committee	23,780	23,780
Elections Committee	133,263	133,263
Committee on Program and Budget	19,554	19,554
Pre-RA Retired Meeting	85,000	85,000
RA <i>Today</i> , Reports and Administrative	697,616	702,995
Convention Guests/Past Presidents	49,089	49,089
Total – Representative Assembly	\$ 6,495,869	\$ 6,519,110
OTHER GOVERNANCE		
National Leadership Conferences	\$ 2,053,408	\$ 2,067,396
NEA Board Role and Responsibility Training	277,795	279,947
Strategic and Advisory Standing Committees	555,815	560,119
Total – Other Governance	\$ 2,887,018	\$ 2,907,462

Appendix D: How Your 2016–2018 Dues Dollars Are Allocated

Active Teaching Professionals

	Proposed 2016–2017	Proposed 2017–2018
Goals’ Shared Tactics	\$ 11.03	\$ 11.12
Ensure synergy across NEA’s goals, Strong Affiliates for Educator Voice and Empowerment and Empowered Educators for Successful Students.		
Strong Affiliates for Educator Voice and Empowerment	18.70	18.78
Build key overarching systems to enhance affiliate capacity to organize, engage, and empower members to fend off attacks on their rights and to improve public education, with emphasis on ballot measures and legislative initiatives. Provide financial support, technical assistance, field support, member engagement support, communications support, partnership brokering, and facilitate the sharing of best practices throughout the Association.		
Empowered Educators for Successful Students	11.38	11.45
Develop meaningful partnerships with school sites, local affiliates, and state affiliates to move an Association-led, student-centered agenda focused on quality and equity, with a special emphasis on the quality of the professionals, the quality of professional practice, the quality of student learning, and the quality of educator and Association leadership.		
Research, Policy, and Practice	0.74	0.75
Provide support to affiliates in efforts to expand, improve, and enhance pro-public education policy, improve practice, teaching and learning conditions, standards, and workforce quality. Provides specific attention to policies related to ESP and Higher Education.		
Organizing and Operational Support to Affiliates	51.88	52.03
Support the UniServ program, test effective value propositions for all membership classes, develop a culture of organizing to drive more effective member recruitment, retention, and relevance and by doing so, build Association and member capacity.		
Member Advocacy and Outreach	10.93	11.02
Harness the incredible power of members to engage in and advocate for NEA’s pro-public education agenda, policies, programs, and recommended candidates. Engage partners, particularly in the ethnic minority communities, in advocacy for laws and policies that enhance the lives of and protect the rights of our members, while improving public education within the pursuit of social justice.		
Legal and Insurance Support	19.01	19.02
Implement advocacy programs for members including the Unified Legal Services Program, Fidelity Bond, Association Professional Liability insurance, and a 1 million dollar per member Educators’ Employment Liability insurance program.		
Communications	17.13	17.23
Meet the communications needs of the Strategic Goals and ongoing everyday operations that reach all key audiences in the most effective way. Provide customizable communications with applicability and utility for affiliates and align perennial NEA signature programs and publications to highlight work to improve public education.		
Business Operations	37.05	37.40
Provide business operations to ensure organizational effectiveness through technology infrastructure, financial services, facilities services, and human resources to serve the needs of affiliates and members.		
Governance	7.61	7.67
Implement an inclusive, engaged governance process that fosters member participation and democratic decision-making through such governing bodies as the Representative Assembly, NEA Board, NEA Executive Committee, and NEA committees and task forces.		
Contingency	1.54	1.53
Provide funding for emergencies at the national, state, or local levels.		
	<u>\$187.00</u>	<u>\$188.00</u>

Appendix E: How Your 2016–2018 Dues Dollars Are Allocated

Education Support Professionals

	Proposed 2016–2017	Proposed 2017–2018
Goals’ Shared Tactics	\$ 6.69	\$ 6.77
Ensure synergy across NEA’s goals, Strong Affiliates for Educator Voice and Empowerment and Empowered Educators for Successful Students.		
Strong Affiliates for Educator Voice and Empowerment	11.35	11.44
Build key overarching systems to enhance affiliate capacity to organize, engage, and empower members to fend off attacks on their rights and to improve public education, with emphasis on ballot measures and legislative initiatives. Provide financial support, technical assistance, field support, member engagement support, communications support, partnership brokering, and facilitate the sharing of best practices throughout the Association.		
Empowered Educators for Successful Students	6.91	6.97
Develop meaningful partnerships with school sites, local affiliates, and state affiliates to move an Association-led, student-centered agenda focused on quality and equity, with a special emphasis on the quality of the professionals, the quality of professional practice, the quality of student learning, and the quality of educator and Association leadership.		
Research, Policy, and Practice	0.45	0.46
Provide support to affiliates in efforts to expand, improve, and enhance pro-public education policy, improve practice, teaching and learning conditions, standards, and workforce quality. Provides specific attention to policies related to ESP and Higher Education.		
Organizing and Operational Support to Affiliates	31.49	31.69
Support the UniServ program, test effective value propositions for all membership classes, develop a culture of organizing to drive more effective member recruitment, retention, and relevance and by doing so, build Association and member capacity.		
Member Advocacy and Outreach	6.64	6.71
Harness the incredible power of members to engage in and advocate for NEA’s pro-public education agenda, policies, programs, and recommended candidates. Engage partners, particularly in the ethnic minority communities, in advocacy for laws and policies that enhance the lives of and protect the rights of our members, while improving public education within the pursuit of social justice.		
Legal and Insurance Support	11.54	11.58
Implement advocacy programs for members including the Unified Legal Services Program, Fidelity Bond, Association Professional Liability insurance, and a 1 million dollar per member Educators’ Employment Liability insurance program.		
Communications	10.41	10.49
Meet the communications needs of the Strategic Goals and ongoing everyday operations that reach all key audiences in the most effective way. Provide customizable communications with applicability and utility for affiliates and align perennial NEA signature programs and publications to highlight work to improve public education.		
Business Operations	22.49	22.79
Provide business operations to ensure organizational effectiveness through technology infrastructure, financial services, facilities services, and human resources to serve the needs of affiliates and members.		
Governance	4.62	4.67
Implement an inclusive, engaged governance process that fosters member participation and democratic decision-making through such governing bodies as the Representative Assembly, NEA Board, NEA Executive Committee, and NEA committees and task forces.		
Contingency	0.91	0.93
Provide funding for emergencies at the national, state, or local levels.		
	<u>\$ 113.50</u>	<u>\$ 114.50</u>

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Strategic Goals

GS = Goals' Shared Tactics
G1 = Strong Affiliates for Educator Voice and Empowerment
G2 = Empowered Educators for Successful Students

Core Function Areas

C1 = Research, Policy, and Practice
C2 = Organizing
C3 = Advocacy and Outreach
C4 = Communications
C5 = Business Operations
C6 = Governance

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Strategic Goals

GS = Goals' Shared Tactics
G1 = Strong Affiliates for Educator Voice and Empowerment
G2 = Empowered Educators for Successful Students

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Core Function Areas

C1 = Research, Policy, and Practice
C2 = Organizing
C3 = Advocacy and Outreach
C4 = Communications
C5 = Business Operations
C6 = Governance

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