

NEOA Strategic Plan 2016-2021

Goal #1: Strengthen and Support State Associations

Goal	Activities	Designee	Timeline	Measurable Outcome
Goal 1.1: Create regional structures to enhance coordination with states	A) Support state level professional development activities and communicate through NEOA resources i.e. website, Board meetings, etc.	A) State Presidents	A) Ongoing	A) Dissemination of PR materials
	B) Continue state initiative grant process and COE grant proposal process.	B) President-Elect	B) Ongoing	B) State initiative grants awarded and implemented.
	C) Provide outreach to states during the grant-writing period	C) State Presidents	C) Within month of notification of grant submission date	C) Efforts made submitted in Board Reports.
	D) Provide outreach to newly funded programs	D) State Presidents	D) Within month of notification of grant submission date	D) Efforts made/submitted in Board Reports.
	E) Develop strategies to strengthen states' ability to meet their individual goals and objectives.	E) President-Elect/State Presidents	E) Ongoing	E) Efforts made/submitted in Board Reports. Goals that were set at the beginning of year are reported out at the last Board meeting of the year. State initiative grants awarded and implemented.
	F) Assess state needs via survey	F) President-Elect	F) June	F) All state surveys returned and reviewed by September meeting.

	G) Identify a goal with each state to help with a specific need.	G) President-Elect	G) September-December	G) Identified annual goal for each state reported.
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Goal	Activities	Designee	Timeline	Measurable Outcome
Goal 1.2: Dedicate appropriate resources to strengthen and support state associations.	A) Strategically plan for a dedicated advocacy budget for outreach to newly elected members of Congress	A) Advocacy Chair	A) September	A) Dissemination of PR materials
	B) Strategically plan for a dedicated state initiative budget	B) Advocacy Chair	B) September	B) State initiative grants awarded and implemented.
	C) Coordinate information sharing for COE and NEOA (Clearinghouse, website)	C) President	C) Ongoing	C) Efforts made/submitted in Board Reports.

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Goal #2: Provide Professional Learning Opportunities for Membership

Goal	Activities	Designee	Timeline	Measurable Outcome
Goal 2.1: Identify and assess professional learning needs of membership i.e. annual survey	A) Summarize evaluations from annual conference	A) Vice-President	A) June	A) Summary of surveys completed
	B) Collect information at program round tables	B) Designated point person	B) March/April	B) Summary of round table discussion presented.
	C) Survey members by program annually using accessible online tools	C) Professional Development Chair	C) March/April	C) Board Reports include results of member surveys.
	D) Expand Professional Development Committee to include a point person for each program to disseminate and collect information	D) Professional Development Chair	D) June	D) One representative from each program on Professional Development Committee

Goal	Activities	Designee	Timeline	Measurable Outcome
<p style="text-align: center;">Goal 2.2: Develop comprehensive professional development activities to meet member needs</p>	A) Establish vision for professional development	A) Professional Development Chair	A) September	A) Vision written at 1st Board meeting
	B) Use assessment information from 2.1 to plan	B) Professional Development Chair/Committee	B) September	B) Written summary reviewed
	C) Consult/ coordinate with technology and access chair to make sure needs of specific audiences are considered	C) Professional Development Chair	C) Ongoing	C) Reported out at Board meetings
	D) Provide State leadership professional development and mentoring	D) Professional Development Chair/State Presidents	D) November	D) State leaders complete a survey to provide feedback for the last Board meeting

Goal	Activities	Designee	Timeline	Measurable Outcome
				Minimum of 3 professional development events provided. 50% of membership engage in professional development activity annually.
<p align="center">Goal 2.3: Provide professional development opportunities that are responsive to needs of Educational Opportunity Personnel (EOP)</p>	A) Implement professional development activities including annual conference, professional development days, and leadership institute	A) Professional Development Chair/Conference Chair	A) Ongoing	A) 1 annual conference and 2 PD days/year provided.
	B) Coordinate with individuals willing to chair professional development days	B) Professional Development Chair	B) Ongoing	B) 2 PD leaders and the VP/Conference Chair identified by June Board meeting for following year events
	C) Coordinate technology needs of professional development activities as needed	C) Technology Chair	C) Ongoing	C) Included in Board reports
	D) Provide new directors training at regional conference	D) Professional Development Chair/Conference Chair	D) March/April	D) Complete and report out at last Board meeting

Goal	Activities	Designee	Timeline	Measurable Outcome
Goal 2.4: Maximize technology as a vehicle for information gathering and dissemination	A) Send information to listserv and post on website	A) Professional Development & Event Chairs	A) October	A) Complete and report out at last Board meeting
	B) Explore and expand technology to include webinars, podcasts, reading groups, etc.	B) Technology Chair & Professional Development Chair	B) Ongoing	B) Complete and report out at last Board meeting

Goal	Activities	Designee	Timeline	Measurable Outcome
Goal 2.5: Distribute membership materials to EOP and new hires	A) Generate a list of all new programs in the region at conclusion of each program competition	A) State Presidents	A) Ongoing	A) List of new programs distributed to all state leaders within 1 month of slate(s) being released
	B) Call all new directors, new staff and new programs to provide information about NEOA and its professional development activities	B) State President	B) Ongoing	B) Names and contact information submitted to Membership Chair by January

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Goal #3: Foster Leadership within NEOA

Goal	Activities	Designee	Timeline	Measurable Outcome
Goal 3.1: Define and publicize various leadership opportunities within NEOA	A) Provide information on leadership opportunities and benefits at each professional development day and state conference	A) President/State Presidents	A) Ongoing	A) Included in written Board reports at each Board meeting
	B) Discuss opportunities for leadership as part of soliciting nominations for officer positions	B) Past President	B) September - January	B) Included in written Board reports at each Board meeting
	C) Promote leadership positions in newsletters and online	C) Publicity/Newsletter Chair(s)	C) Ongoing	C) Included in written Board reports at each Board meeting
	D) Engage new members in committee work	D) Past President/State Presidents	C) Ongoing	D) Included in written Board reports at each Board meeting

Goal	Activities	Designee	Timeline	Measurable Outcome
<p style="text-align: center;">Goal 3.2: Encourage Board members to identify, recruit and mentor individuals for Board leadership roles</p>	A) Provide shadowing opportunities for each position	A) NEOA officers/State Presidents	A)January	A) An inventory of shadowing options is distributed to the membership.
	B) Provide leadership workshops at NEOA annual and state conferences	B) Conference Chair/State Presidents	B)December	B) Complete and report at Board meeting
	C) Promote leadership opportunities at newcomers' reception i.e. regional and state associations	C) Conference Chair/State Presidents	C)March/April	C) Complete and report at March/April Board meeting

Goal	Activities	Designee	Timeline	Measurable Outcome
Goal 3.3: Encourage the involvement of Arnold Mitchem Leadership Institute (AMLI) alumni with NEOA		Leadership Institute Coordinator	January	Leadership Institute alumni assigned to participate in NEOA/state activities.
	A) Maintain a list and listserv of AMLI alumni	A) Professional Development Chair	A) November	A) Complete and report at last Board meeting
	B) Establish expectations of AMLI alumni e.g. reach out to new EOP professionals, make a commitment to serve	B) Professional Development/AMLI Director	B) March	B) Complete and report at March/April Board meeting

Goal	Activities	Designee	Timeline	Measurable Outcome
Goal 3.4: Provide leadership opportunities to staff with five plus years in EOP with the goal of reengagement in NEOA		Membership Chair/ PD Chair	September	NEOA Directory maintained and a list of veteran staff is distributed to the Board and Committee Chairs.
	A) Identify veteran staff	A) Membership Chair/PD Chair/President-Elect	A) December/June	A) Report at Board meetings with final list submitted at June Board meeting
	B) Maintain an NEOA directory including veteran staff identification	B) Membership Chair	B) January	B) Report at Board meetings with completion at last Board meeting
	C) Develop workshops for veteran staff	C) Committee Chairs	C) Ongoing	C) Workshop ideas determined by June for upcoming year
	D) Develop speaking opportunities for veteran staff	D) President	D) Ongoing	D) Complete and report at June Board meeting
	E) Engage veteran staff in recruitment for state and regional board positions	E) Past President	E) Ongoing	E) Veteran staff are invited to assist as NEOA and/or state workshop facilitators, and/or with nominations

Goal	Activities	Designee	Timeline	Measurable Outcome
<p style="text-align: center;">Goal 3.5: Develop and promote leadership opportunities for state and regional board positions</p>		Past President	Ongoing	Roster of participants for Leadership Institute and Policy Seminar include representation from all states.
	A) Promote COE Leadership Summit as leadership opportunity	A) State Presidents	A) September-January	A) 1 member from each state attends Leadership Summit
	B) Promote the Leadership Institute at the NEOA and state conferences	B) State Presidents/Past President	B) April-May	B) Complete and report at June Board meeting
	C) Conduct the NEOA AMLI alternating years	C) Leadership Institute Coordinator	C) September-June	C) Complete and report at June Board meeting of AMLI years
	D) Engage Leadership Institute participants in NEOA Board committees	D) PD Chair/NEOA Officers	D) April	D) Complete and report at June Board meeting
	E) Provide orientation as well as training and support for all Board positions	E) President/Past-President/Committee Chairs	E) September (Orientation);	E) State leaders, standing and ad hoc committees hold breakout sessions at each Board meeting

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Goal #4: Build and strengthen NEOA's Financial & Organizational Resources

Goal	Activities	Designee	Timeline	Measurable Outcome
				Annual budget is presented to Board for review and adoption.
Goal 4.1: Maintain a reserve equal to one-half of annual expenses	A) Establish annual budget reflecting goals and priorities	A) President-Elect/Treasurer/Finance Chair	A) Prior to September	A) Reviewed and approved at September Board meeting
	B) Analyze annual budget and calculate amount of reserve needed	B) President-Elect/Treasurer/Finance Chair	B) Prior to September	B) Reviewed and approved by Finance Committee at September Board meeting
	C) Monitor, reconcile and report fiscal status on a monthly basis	C) Treasurer Finance Chair	C) Quarterly	C) Reported at each Board meeting
	D) Conduct monetary transactions i.e. opening certificates of deposit and other forms of investment	D) Treasurer	D) Ongoing	D) Reported at each Board meeting
	E) Investigate investment options for reserve funds	E) Finance Chair	E) Ongoing	E) Reported at each Board meeting

Goal	Activities	Designee	Timeline	Measurable Outcome
		President-Elect/ Development Chair	September	Development Plan designed and presented to the Board.
<p align="center">Goal 4.2: Create an annual development plan to support NEOA activities each year</p>	A) Establish annual development goal	A) President-Elect & Development Chair	A) September	A) Determined at first Board meeting
	B) Represent Association in public arena to potential funders to identify and cultivate contacts	B) Development Chair & Committee	B) Ongoing	B) Reported at each Board meeting
	C) Generate a pool of supporters for the Development Plan	C) Development Chair & Committee	C) November	C) List created and reported by the 2nd Board meeting
	D) Identify state leader in each state to support Development Chair	D) Development Chair	D) September	D) List created and reported at 1 st Board meeting

Goal	Activities	Designee	Timeline	Measurable Outcome
		Public Relations Chair	January of 1st Year of approved Strategic Plan	4 Year Marketing Plan designed, approved and implemented.
<p align="center">Goal 4.3: Develop and implement a marketing plan for NEOA</p>	A) Review and update existing marketing materials and media to support development plan	A) Development Chair/Newsletter Chair/Public Relations Chair	A) November	A) Marketing/media materials prepared by 2nd Board meeting
	B) Identify target audiences	B) President/Public Relations Chair	B) Annually	B) Audience identified and reported at 2nd Board meeting
	C) Develop customized messages to reach target audiences	C) Public Relations Chair	C) Ongoing	C) Complete by 2nd Board meeting
	D) Evaluate plan effectiveness & results	D) President/Public Relations Chair	D) June	D) Summary of efforts provided at June Board meeting
	E) Prepare, file and submit state & federal forms by due dates.	E) Treasurer	E) Ongoing	E) Reported at June Board meeting

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Goal #5: Strengthen NEOA's capacity to advocate on behalf of EOP students

Goal	Activities	Designee	Timeline	Measurable Outcome
		Advocacy Chair/ State Presidents	October/ November	Advocacy goals presented to Board including New England Council events, State Initiative-funded events, Policy Seminar, COE/Spraggins grants.
Goal 5.1: Review existing committee structures and revise bylaws if necessary to ensure strong advocacy efforts	A) Develop advocacy goals	A) Advocacy Chair/State Presidents	A) Ongoing	A) Goals established at 1st Board meeting
	B) Charge committees to address advocacy goals	B) Advocacy Chair	B) Ongoing	B) Committee assignments made to meet goals at 1st Board meeting
	C) Establish a plan for outreach to new members of Congress	C) State Presidents	C) Ongoing/ March	C) State Fact Sheets completed, posted and distributed at Policy Seminar.

Goal	Activities	Designee	Timeline	Measurable Outcome
Goal 5.2: 5.2. Provide information and training to promote connection between state and national advocacy issues	A) States identify advocacy needs and write State Initiative grant applications to address those needs	A) State Presidents	A) Ongoing	A) Plan state advocacy events
	B) Provide advocacy training on pertinent political issues	B) State Presidents	B) Ongoing	B) Reported at Board meetings
	C) Provide advocacy training prior to Policy Seminar for state leaders	C) Advocacy Chair	C) February/ March	C) Representatives from all states registered for Policy Seminar. Formalized Policy Seminar training provided for all New England Team Leaders.

Goal	Activities	Designee	Timeline	Measurable Outcome
		State Presidents/ Conference Chair/Alumni Chair	Ongoing	Alumni database established, maintained and employed in advocacy efforts
<p align="center">Goal 5.3: Expand TRIO/GEAR UP alumni presence in NEOA to assist advocacy efforts.</p>	A) Secure alumni presence at conference and Policy Seminar	A) State Presidents	A) January - March	A) Alumni from all states registered for Policy Seminar.
	B) Engage alumni through alumni database and social media	B) Alumni Chair/PD Chair	B) Ongoing	B) Alumni from all states invited to attend annual conference. Alumni event incorporated into the regional conference.
	C) Provide advocacy training prior to Policy Seminar for state leaders	C) Advocacy Chair	C) February/ March	C) Representatives from all states registered for Policy Seminar. Formalized Policy Seminar training provided for all New England Team Leaders.

Goal	Activities	Designee	Timeline	Measurable Outcome
		State Presidents/ Advocacy Chair/ Alumni Chair	Ongoing	Elected legislative officials and staff of each state are notified of TRIO/GEAR UP events.
<p align="center">Goal 5.4: Facilitate and support attendance of members and alumni at state and national advocacy events</p>	A) Hold strategic political events at the regional conference and throughout the year	A) State Presidents & Advocacy Chair	A) Ongoing	A) Heightened visibility of programs in the states.
	B) Schedule meetings with elected officials, representatives and Congressional staff	B) State Presidents/State Liaisons	B) Ongoing	B) Policy Seminar appointments made and met.
	C) Publicize regional, state and national TRIO/GEAR UP events to elected legislative officials and staff	C) Public Relations Chair	C) Ongoing	C) Legislators attendance and/or recognition at events.