

2025 NEA National Leadership Summit
Content Block 2 – Session Descriptions: Saturday, March 8, 1:00-3:00 p.m. ET



## **ADVOCACY**

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

| COMPETENCY DOMAIN FOCUS | SESSION TITLE, DESCRIPTION, LEARNING LEADS  |
|-------------------------|---|
| ADV200                  | <b>Title:</b> An Exploration into SOGI: Sexual Orientation and Gender Identity in Schools   |
|                         | <b>Description:</b> Do you have LGBTQ+ students and/or colleagues? Do you have the courage to create a safe environment to explore sexual orientation, gender identity, and expression? This workshop is a transformative experience into privilege, identity, laws, and terms as it applies to SOGI. Come and learn how to foster positive relations with and support LGBTQ+ students and colleagues. <b>Learning Lead(s):</b> C Scott Miller, Emily Osterling |
| ADV202                  | Title: Building Relationships with Stakeholders in Your District  |
|                         | <b>Description:</b> In this session, leaders from the Florence Education Association will involve participants in interactive discussions, self-assessment tools to evaluate their advocacy skills and stakeholder relationships, as well as collaborative group activities to share insights.  |
|                         | Learning Lead(s): Ashleigh Muhme, Heather Hellmich  |
| ADV203                  | <b>Title:</b> Coalition Building for Change: Organizing Union-Led School Meal Initiatives   |

|        | Description: How can unions organize impactful community campaigns that deliver real, tangible wins for public schools? This session s showcase a campaign about a food justice initiative led by educators and community organizers working in coalition to revamp their school meal program to ensure free school meals for all students. Participants will learn to utilize and expand their skills across multiple leadership domains to build and lead effective, equity-focused campaigns.  Learning Lead(s): Natasha Sullivan   |
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| ADV204 | <b>Description:</b> Let's level up the graduation game! Join us to explore how states are transitioning to "Portraits of a Graduate" to better prepare students for life after graduation. By focusing on universal and functional skills such as critical-thinking, collaboration, and communication, Portraits of a Graduate enhance equity and access to graduation for all students. We'll review state exemplars and discuss how to design profiles that create more inclusive and comprehensive educational frameworks. <b>Learning Lead(s):</b> Caleb Mickler                   |
| ADV206 | <b>Description:</b> Electing NEA members on the local, state, and federal level is crucial to our success in creating the schools our students and educators deserve. This session is targeted toward leaders who are interested in running for public office (not NEA). Participants will learn how to craft a one-minute vision statement, examine the core components of what it takes to run for public office, review the steps to take before kicking off a successful campaign, and hear from a See Educators Run alumni. <b>Learning Lead(s):</b> Meighan Davis, Lee Hedgepeth |
| ADV207 | <b>Description:</b> Implicit bias, often unconscious, can significantly influence our perceptions, behaviors, and decision-making. This interactive session will explore real-world examples of implicit bias and its impact on leadership. Participants will gain valuable insights   |

|        | into recognizing and addressing their biases and learn strategies to foster a more inclusive and equitable environment.  Learning Lead(s): Lisa Jennings, Ryans Calmont  |
|--------|--|
| ADV208 | Title: Stop the Harm: Advocacy to Limit Student Cell Phone Use and Hold Social Media Companies Accountable  Description: Social media and students' use of personal devices in   |
|        | school drive growing concern among educators about worsening learning conditions and their impact on students' mental health, social interactions, and safety. In this session, participants will dig into the data and arguments, analyze case studies, and explore state and local policy. They will also delve into advocacy options to curb personal device use among students, hold social media companies accountable, and develop an advocacy plan tailored to their association's needs. |
|        | <b>Learning Lead(s):</b> Mary Beth Szydlowski, Laurie Moskowitz, Paul Lemle  |



# **COMMUNICATION**

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

| COMPETENCY DOMAIN FOCUS | SESSION TITLE, DESCRIPTION, LEARNING LEADS  |
|-------------------------|---|
| COM200                  | <b>Title:</b> Building a Better Future: Using Social Media to Amplify Union Voices  |
|                         | <b>Description:</b> In this digital age, social media platforms have become powerful tools for communication and mobilization. Unions can leverage these platforms to connect with members, engage the public, and build momentum for positive change. Social media offers a unique opportunity to reach a broader audience by connecting with members, amplifying union voices, educating the public, and mobilizing for action.   |
|                         | Learning Lead(s): Sabina Ellis  |
| COM201                  | Title: Social Media for Advocacy  |
|                         | <b>Description:</b> With 226 million Americans on social media, the union can unlock its potential to share its vision and leverage power. Join this dynamic session exploring digital storytelling, your online voice as an educator, and evolving platforms. Gain insights from our digital experts and best practices for platforms like Facebook, Instagram, and whatever Twitter is called these days. You'll learn to amplify your advocacy through digital organizing. |
|                         | Learning Lead(s): Justin Conley   |
| COM202                  | Title: What Makes a Great NEA Messenger   |
|                         | <b>Description:</b> Seven important characteristics distinguish effective leaders who can deliver a compelling message. This workshop will examine these critical aspects and prepare participants for a diverse range of message delivery systems that they can use to successfully impact change on behalf of their students and profession.  |
|                         | Learning Lead(s): Tory Brown  |

#### COM203

**Title:** Power of Storytelling: Using Your Authentic Voice to Galvanize and Inspire

**Description:** Everyone loves a good story, and educators have the best stories. Participants in this session will explore ways to use stories from their personal experiences as educators to help advance student success, public education, and the education professions. Participants will gain a deeper understanding of how personal stories have the power to change attitudes, perceptions, behavior, and win support for public education.

**Learning Lead(s):** Brenda Alvarez, Mary Ellen Flannery



## **GOVERNANCE AND LEADERSHIP**

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

| COMPETENCY<br>DOMAIN FOCUS | SESSION TITLE, DESCRIPTION, LEARNING LEADS  |
|----------------------------|---|
| GOV 200                    | <b>Title:</b> Always Together: EA and ESP Units working together in K-12 Districts  |
|                            | <b>Description:</b> Some districts contain many locals. Communication between units is important to make sure everyone's voice is heard and that information is shared consistently. We will guide you through a multiyear effort to build the communication and relationship between an EA and ESP group for the betterment of all members and students.   |
|                            | Learning Lead(s): Sarah Garrett, Anthony Pennock  |
| GOV201                     | Title: Growing Leaders Through Intentional Programming  |
|                            | <b>Description:</b> Participants will learn how to help members connect their interests and passions to the union. Green Bay Education Association's Emerging Voices has been an instrumental part of growing the leadership of our organization and helping members become more involved. Participants will engage in specific activities that can be implemented at the local level to strengthen the organization.   |
|                            | Learning Lead(s): Audrey Vandeyacht, Brent Bergstrom  |
| GOV202                     | <b>Title:</b> Growing Your Individual Capacity: How to Use the LCG in Your Leadership Journey   |
|                            | <b>Description:</b> In the fast-paced, always-changing environment of education, leadership needs to change and evolve to meet the needs of those we are leading. Meeting people where they are in their journeys is vital to growing new leaders. Who is meeting you where you are? Are you? While growing those around you, are you also prioritizing your own growth and capacity? Join us to learn how to use the NEA Leadership Competency Guide to complete a self-assessment on your areas of strength and areas for growth. |

|        | Learning Lead(s): Stacey Tayman, Shondea Chapman   |
|--------|--|
| GOV203 | <b>Title:</b> Helping Members of Color Navigate and Thrive in White-Centric Spaces   |
|        | <b>Description:</b> Creating diverse and equitable unions where members of color can thrive doesn't just happen, it takes intentionality and action to create systemic change. This training focuses on the Importance of valuing diversity, addressing biases, and providing ongoing education and support for members of color. We will also highlight practical action steps that leaders can take to make their unions more equitable and democratic spaces for everyone.  |
|        | Learning Lead(s): Laura Latham, Rosario Medina   |
| GOV204 | Title: Lead Like an ESP  |
|        | <b>Description:</b> This session will delve into the unique challenges that ESPs face, which often make their leadership journey more complex compared with other leaders. By examining these specific hurdles, the facilitators will offer strategies to effectively navigate them. Collaboration will be a key component, as participants will work together with fellow leaders to develop comprehensive plans that address common obstacles hindering ESP advancement. This training is designed for ESP leaders and other education leaders who support them. |
|        | Learning Lead(s): Tameka Mays, Jozette Hartsfield  |
| GOV205 | <b>Title:</b> Leading With Purpose: Empowering Association Presidents to Advocate and Elevate Voices   |
|        | <b>Description:</b> In this interactive session, participants will explore key strategies for developing strong association leadership, with a special focus on the role of the president and advocacy at both the local and district levels. Led by the current president of a local association, this workshop is designed to empower leaders to enhance their effectiveness and ensure that executive board members have a voice in decision-making processes.  |
|        | Lead(s): Paula Johnson   |

#### GOV206

**Title:** Learning From Leaders: Using Collaboration and Competencies to Build Local and State Capacity

**Description:** Currently in our fourth year of the Presidents' Mentoring Cohort, this program was created to provide real-time resources and solutions for our local leaders. Experienced leaders are paired with new leaders based on preferences provided in a survey. The group meets collaboratively as a whole, focusing on issues/topics of their choosing while the mentor/mentee pair share resources and even receive the opportunity to receive release time for observations, meetings, Q&A, and whatever is needed most.

**Learning Lead(s):** Stephanie Cammack, Lori Burris, Cari Elledge, Rhonda Harlow



# **LEADING OUR PROFESSIONS**

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

| COMPETENCY DOMAIN FOCUS | SESSION TITLE, DESCRIPTION, LEARNING LEADS   |
|-------------------------|--|
| LOP200                  | Title: Artificial Intelligence: Leading Education Into the Future  |
|                         | <b>Description:</b> As artificial intelligence (AI) continues to become more powerful and integrated into society, it will continue to have a major impact on the education sector. From administrators to classroom teachers to support professionals, AI will influence how we educate students and prepare them for the future. In this session, learn more about AI and its applications, and dive into the brand-new NEA policy statement and report on AI.   |
|                         | Learning Lead(s): Justin Thompson, Angie Powers  |
| LOP201                  | Title: Ignite Your Impact: Early Career Educators as Changemakers!   |
|                         | <b>Description:</b> How can we transform schools into spaces that inspire innovation and lay the groundwork for a just society? We'll explore how early career educators hold the key to shaping powerful environments that can transform moments into sustainable movements both inside and beyond the classroom. In this session, participants will use action planning to bolster their "why," "what", and "how" to push for transformation in education, and our union. Join us to elevate your impact as next gen changemakers! |
|                         | Learning Lead(s): Krishawna Goins  |
| LOP202                  | <b>Title:</b> Joy and Justice for All: Strategies for Leaders to Foster Spaces Where Joy, Justice, and Learning Coexist  |
|                         | <b>Description:</b> How can you center joy and justice in your profession? In this session, we will explore strategies to create inclusive, empowering environments for educators and students. We will discuss the role of justice in shaping holistic learning experiences and engage in activities that highlight the power of joy in fostering positive, equitable spaces that drive student success.  |

|        | Learning Lead(s): Christian Gordon  |
|--------|---|
| LOP203 | <b>Title:</b> Leading Through Reading: Advancing Disability Rights Advocacy Through Book Clubs  |
|        | Description: Virtual book clubs take us on a transformative journey towards greater awareness and inclusive education. This session empowered educators to champion disability rights by leading local book clubs. Discover NEA resources for how to establish local book clubs, engage in best practices, and sign up to lead a club. You'll also learn about books that NEA recommends for local initiatives. Leading through reading is a way to challenge ableism and advocate for equitable policies that create inclusive environments. |
|        | Learning Lead(s): Melissa Mayville, Brittany Patrick  |
| LOP204 | <b>Title:</b> Mentoring, Gaming, and Training: Developing Leaders Through Meaningful Collaboration  |
|        | <b>Description:</b> With an emphasis on the unions' role in leading our profession, participants will identify successful member-led structures for reciprocal mentoring, gamified member engagement, and union-led professional development. At the conclusion of the workshop, participants will design a plan of implementation for one (or more) structure to lead their association in meaningful collaboration.   |
|        | Learning Lead(s): Gabrielle Wright, Shannon Rasmussen   |
| LOP205 | <b>Title:</b> Mentoring Male Educators of Color: Developing and Sustaining Leaders for Tomorrow   |
|        | <b>Description:</b> While studies have examined mentors and their communities of practice, researchers haven't filled in the gaps to attain and maintain male teachers of color. This seminar will delve into the usefulness of mentoring as a tool for recruitment, development, and retention.  |
|        | Lead(s): Robert Barnes, William Jackson   |
| LOP206 | <b>Title:</b> Making the Grade: Advancing Equity in Grading (2-part session)  |

**Description:** In this interactive workshop, educators will explore strategies to make grading practices more equitable and fairer for all students. Participants will engage in discussions, activities, and reflections to understand the impact of traditional grading systems and discover alternative approaches. During our activity, educators will experiment with various grading policies and compare their effectiveness in fostering fair learning environments that uplift the profession and student success.

**Learning Lead(s):** Christine DonFrancesco, Tony Martinet



## **ORGANIZING**

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

| COMPETENCY DOMAIN FOCUS | SESSION TITLE, DESCRIPTION, LEARNING LEADS   |
|-------------------------|--|
| ORG200                  | <b>Title:</b> Creating the Schools Denver's Students Deserve: Organizing and Advocating in Communities of Color  |
|                         | <b>Description:</b> Denver educators have welcomed over 3,800 new-to-country students into schools in the last year. Learn how the Denver Classroom Teachers Association (DCTA) organized its members, elected officials, and community to advocate for our new-to-country families. This session will demonstrate how DCTA was able to strengthen relationships with our communities of color, empower members to lead, and improve learning conditions for all students and families.  |
|                         | Learning Lead(s): Kim Manning-Ursetta, Amie Baca-Oehlert   |
| ORG201                  | <b>Title:</b> Empowering Educators: Strategic Organizing for Collective Action   |
|                         | <b>Description:</b> In this interactive session, participants will explore practical, innovative strategic-organizing principles and practices with proven results. Participants will explore the importance of relatability, engagement strategies, personalized 1:1 discussions, and techniques for leveraging social media platforms. Focusing on effective communication, outreach tactics, and inclusive engagement practices, attendees will acquire the skills necessary to mobilize their peers and expand their membership. |
|                         | Learning Lead(s): Maggie Hansford  |
| ORG202                  | <b>Title:</b> Recruiting and Identifying New Members and Leaders: CTE and Second-Career Teachers   |
|                         | <b>Description:</b> Recruitment and identifying new leaders is a challenge for some leaders. However, there are often overlooked groups of leaders, many of whom have career experience and union experience. In this session, we will explore how Career and  |

|        | Technical Education (CTE) and second-career educators provide an opportunity to recruit seasoned leaders who can add capacity to help unions grow and thrive.  Learning Lead(s): David Hope  |
|--------|--|
| ORG203 | <b>Description:</b> Engage members from large, countywide locals (1500+ members), remote locals, small locals, and everyone in between. Learn how to reach apathetic members through practical, costeffective approaches that build relationships, increase involvement, and foster a lasting impact that will boost membership, drive collaboration, and achieve wins with boards and administrators. <b>Learning Lead(s):</b> Lindsey Weatherby  |
| ORG204 | Title: Looking Through an Organizing Lens to Recruit, Retain, and Engage Members  Description: Are you ready to move your local association forward? In this session, you will use data and stories, and organize strategies to recruit, retain, and keep members engaged. You'll implement organizing methods and techniques that can be applied in your associations and communities. You will work through an organizing lens to recruit, retain, and engage members. It's time to harness your passion and drive!  Learning Lead(s): LiseAnn Mills |
| ORG205 | <b>Description:</b> The session will help members build on their organizing skills. Attendees will receive helpful resources and have time to practice and improve their skills in talking with potential members. Members in all educational roles can be organizers. They will leave with skills and resources that they can take home to share with their locals. <b>Learning Lead(s):</b> Brandi McCoid  |
| ORG206 | Title: Organizing Aspiring Educators to Be Part of Y(OUR) Movement   |

|        | Description: Join us for an engaging session on organizing Aspiring Educators (AEs) and growing union power! Learn how to elevate the AE program on national and state levels, strengthen relationships within your community, and empower AEs to take on leadership roles. We'll also dive into the importance of strategic partnerships that lead to real victories. Be part of the movement that builds a stronger, more connected union by harnessing the energy and passion of AEs. Let's win together!  Learning Lead(s): Jessica Bailey   |
|--------|--|
| ORG207 | Title: Relational Organizing: Mastering the Art of 1:1 Conversation Part 2 (2-part session)  Description: In this session, participants will learn how to shift from transactional to transformational organizing conversations using the ISAHUEY method (Introduction, Story, Agitate, Hope, Urgency, Educate, and You – your call to action). We will explore how to build meaningful relationships, actively listen, and understand what matters most to members. Participants will leave with practical strategies to foster deeper connections and empower members to take action and build collective power. This is a 2-part session.  Learning Lead(s): Larry Carey, Yahaira Rodriguez |
| ORG208 | Title: Building a Successful Campaign Toolkit: Contract, Community Issues, and Political  Description: Discover how Camino's contract efforts morphed into a communitywide campaign resulting in a whopping 10% investment in salaries, a groundbreaking settlement that changed the lives of the members and the community for the better, ousted the superintendent and 4 of 5 school board members. Learn successful tactics and practice skills that combine real-world examples adaptable to every local, such as info requests, offensive bargaining, student-centered framing of issues, and more!  Learning Lead(s): Cora Dillard, Karmen Lee Ortloff                                  |
| ORG209 | Title: Increasing Our Member Value Proposition with NEA Member Benefits  Description: Are you looking for ways to engage existing and potential members within your organizing efforts? Are you aware  |

that NEA Member Benefits provides an additional value that saves members money and allows them to recoup dues dollars? Come and learn how you can incorporate this information into providing a way to engage and inform your members about the numerous savings opportunities that they have access to and significantly increase association loyalty!

Learning Lead(s): David Glenn (P); Guy Kendall-Freas



## **SOCIAL AND EMOTIONAL INTELLIGENCE**

Understands the knowledge, skills, attitudes, and behaviors that create healthy identities, manage emotions and achieve personal and collective goals; demonstrates ability to feel and show empathy, establish and maintain supportive relationships, and make responsible, caring decisions.

| COMPETENCY DOMAIN FOCUS | SESSION TITLE, DESCRIPTION, LEARNING LEADS  |
|-------------------------|---|
| SE1200                  | <b>Title:</b> I Can't Hear Without My Glasses: Leading with Psychological Safety  |
|                         | Description: Often, leadership is focused on developing externally oriented knowledge and skills—developing policy, adopting new pedagogy techniques, implementing new technology, and changing the curriculum. At times, we can get lost in the tick-the-box culture of production with the hope that human aspirations and human flourishing will come. In valuing the external production side of the paradox, that is, while there is an interplay between the two, it is the inner life, our identity, and integrity that propels us to find our voice, elevate good ideas, and call out organizational barriers that impede shared goals. This session will focus on developing and synergizing inner and outer leadership awareness.  Participants who attend this session will be a part of a post-Summit virtual cohort that will extend through early June.  Learning Lead(s): Velma Cobb |
| SEI201                  | <b>Title:</b> State Presidents Only Session: Expanding Your Leadership  |
| SLIZUI                  | Potential: The Power of Choice Part 2   |
|                         | <b>Description:</b> As leaders, we often encounter situations where we feel limited in our choices and unsure how to move forward. We'll explore the concept of conscious versus unconscious choices, uncovering how our internal blocks, including GAILs (Gremlins, Assumptions, Interpretations, and Limiting Beliefs), can create an illusion of choice. Through reflective discussions, participants will learn how to recognize and remove barriers to expand leadership options empowering them to lead with purpose and clarity.   |
|                         | Learning Lead(s): Andrea Walker   |

| SEI202 | <b>Title:</b> NEA Leadership in Balance: Restorative Circle for Social-<br>Emotional Wellbeing (2-part session)  |
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|        | <b>Description:</b> It is essential for school and community leaders to prioritize their wellness and cultivate their social-emotional competency to foster a supportive culture within their teams. This interactive session will engage participants in a restorative circle that will encourage open dialogue and a sense of community through shared experiences. A moment of mindfulness along with techniques for managing stress and enhancing emotional resilience will support both personal and collective well-being. Participants will need to sign up for all three sessions and commit to post-Summit virtual engagements. |
|        | Learning Lead(s): Robin McNair   |
| SEI203 | Title: Taiji for Movement Work   |
|        | <b>Description:</b> The session will utilize the mindfulness-based techniques of the Taiji system to help participants learn techniques to calm and strengthen their minds and bodies. The session will be a series of either standing or seated postures (depending on the abilities of each individual) that help regulate the nervous system and balance the physical body and the emotions of the participant. One goal of this contemplative practice of self-care is to help participants develop trauma-informed practices.   |
|        | Learning Lead(s): Chalene Jones  |
| SEI204 | <b>Title:</b> From Shared Concern to Shared Progress: Collaborating to Increase Educator Well-being  |
|        | <b>Description:</b> Educator well-being is of critical importance to culture, retention, and student outcomes. But what can district and union leaders do together to improve staff well-being? Come explore how the Mounds View Education Association (MVEA), in partnership with the district, used an educator-generated tool to give leaders the data needed to improve culture. They also offered an evidence-based well-being course to support staff. Learn how their continuous improvement process has led to measurable progress in educator experiences.  |
|        | Learning Lead(s): Stacey Vanderport, Hallie Fox  |

| SEI205 | <b>Title:</b> Holistic Leadership: Creating Spaces for Healing <b>Description:</b> This professional learning session is designed for education leaders who seek to foster healing-centered communities of care. Participants will explore the powerful intersection of mindfulness and social justice, and gain tools to address educator wellness and belonging. Through this exploration, we will empower leaders to organize communities that gather to practice resilience, inclusion, and healing. <b>Lead(s):</b> Jelena Popovic, Todd Scholl   |
|--------|--|
| SEI206 | Title: Insightful Leadership: Understanding Myself and My Local Through a Social and Emotional Lens  Description: Have you ever wanted to scream because you didn't know which fire needed your attention first as a local leader? In this interactive session, participants will identify emotions and reactions that might be seen within their local. They will learn how to set themselves and local association members up for success by using a social and emotional lens to understand themselves, their local, and leadership while navigating processes and procedures.  Learning Lead(s): Amber Brown   |
| SEI207 | <b>Title:</b> Knowing Myself to Better Connect with Students, Educators, and the Community <b>Description:</b> Participants will examine the influence of culture and socialization. Developed from the foundations of diversity, cultural competence, and social justice, the presenters will lead the participants in exercises to enhance their cultural self-awareness. Participants will reflect on how that impacts the way they view themselves and others. They will explore the process of socialization in establishing "norms" of individual identity using the Bobbie Harro model for a cycle of socialization. <b>Learning Lead(s):</b> Jackie Wooten, LaVeta Weatherington |
| SEI208 | <b>Title:</b> Lead from Your Best Self: Deepen Your Resiliency in the Face of Challenge and Pressure   |

|        | Description: This engaging session is designed to empower educational leaders to thrive despite the challenges. A 2022 Gallup Poll identified educators as the most burned-out professionals in the U.S. Educational leaders are particularly susceptible to burnout and emotional exhaustion. In this session, participants will gain practical approaches for activating key SEL competencies that increase agency and resiliency while fostering fulfillment and wellbeing.  Learning Lead(s): Jay Schroder   |
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| SEI209 | Title: Embrace, Empower, Excel: Cultivating Social-Emotional Intelligence for Democratic Leadership (2-part session)  Description: This session is a continuation of part 1. In this session participants will continue their transformative journey to connect the dots between education, democracy, freedom, and your own leadership potential? Join us for an immersive workshop designed to empower educators, administrators, paraprofessionals, and all education staff with essential social and emotional intelligence skills that can be applied to your life.  Learning Lead(s): Cynthia Thompson                           |
| SEI210 | Title: Leading With Balance: Prioritizing Mental Health for Sustainable Leadership  Description: This session will empower leaders to prioritize mental health for sustainable leadership in their careers and lives. Through interactive exercises, participants will build emotional intelligence, develop stress management techniques, and create supportive environments. This session equips leaders with practical strategies and action plans to foster well-being, ensuring they maintain resilience and effectiveness in all aspects of their professional and personal lives.  Learning Lead(s): Shauna Gorton, Hannah Rake |



## STRATEGY AND FISCAL HEALTH

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

| COMPETENCY DOMAIN FOCUS | SESSION TITLE, DESCRIPTION, LEARNING LEADS   |
|-------------------------|--|
| SFH200                  | <b>Title:</b> How to Do an Internal Audit of Your Association's Financial Records Agenda   |
|                         | <b>Description:</b> This session will provide basic information about what an audit is, why it is important to annually audit your association's financial records, and how to do an internal audit with two to three people. During this session, attendees will do a hands-on exercise in performing an internal audit to demonstrate how easy it is to do one.  |
|                         | Learning Lead(s): Paula Purdy, Rodney Rowe   |
| SFH201                  | Title: Managing Local Association Finances: Best Practices   |
|                         | <b>Description:</b> The session will help participants understand: 1. Governance roles and responsibilities for local elected leaders; 2. Regulatory requirements for local associations; 3. Best practices for managing local association finances; 4. The importance of the three "Ps" (protecting funds under their care; protecting the association by spending wisely and saving for rainy day; and protecting their integrity); 5. How to prepare local association financial statements.        |
|                         | Learning Lead(s): Bob Maleta   |
| SFH202                  | <b>Title:</b> Building a Leadership Superpower: Leveraging Strategic Coalitions  |
|                         | <b>Description:</b> A sometimes-overlooked leadership superpower is the ability to leverage strategic coalitions to accomplish your association's goals. Join five experienced association and pension trustee leaders for an interactive session utilizing real-life examples, case studies, and actual strategic organizing and advocacy work to draft and pass a new business item (NBI) (at the 2024 NEA Representative Assembly designed to defends public pensions and your retirement security. |

|        | <b>Learning Lead(s):</b> Andrew Hirshman, Denise Bradford, Deborah Simonds, Sue Lemmo, Doug Prouty   |
|--------|--|
| SFH203 | <b>Title:</b> Creating a Culture of Listening: Using Applied Improvisation Principles for Deeper Engagement  |
|        | <b>Description:</b> In a democratic organization, authentic stakeholder engagement is critical to developing an organizational strategy that is embraced by all. Applying the principles of improv can create a culture of listening that leads to deeper engagement throughout the strategic planning process and ultimately a strategic plan that reflects the needs of all stakeholders. This interactive session will explore the principles of improv and their practical applications to stakeholder engagement. |
|        | Learning Lead(s): Sarah Ammar  |

| BOD200                 | <b>Title:</b> NEA Directors: Roles and Responsibilities at the NEA Representative Assembly  |
|------------------------|---|
| Note: For NEA Board of |   |
| Directors Only         | Description: Participants will explore how their thoughts and emotions directly influence their actions, often without conscious awareness. Using the Energy Leadership framework, you'll uncover how you "show up" in both optimal and stressful situations. You'll learn: 1) Practical tools to recognize your energy levels and identify the underlying patterns that drive your responses and 2) strategies to make conscious choices that align with your values and serve your goals instead of being driven by stress and habit. |
|                        | <b>Learning Lead(s):</b> Angie Powers, Jeb Binns, Denise Lake, Paula Merrigan, Robert Rodriguez, Ron 'Duff' Martin, Sherri Schwanz, Ivory Smith, Hannah StClair, Brian Skinner, Edward Ventura  |