



Horace Mann League

2020 Strategic Plan

Executive Summary

The **Horace Mann League** was founded in 1922 with a **mission to advocate for public schools and support administrators, teachers, parents, and students**. The Horace Mann League consists of educational leaders who support funding public schools to optimize student success in the classroom. The 5-year strategic plan aims to **refresh the vision, strategies, tactics, and future leadership**.

Current State

- A book on the importance of public education will be published in 2022 to celebrate the league's 100 year anniversary
- COVID-19 has highlighted the need for supporting our nation's public education system and providing educators with a credible source of information as they navigate this unprecedented time
- The pandemic has also delayed in-person events, which has hurt the League financially

Value offering Recommendations

- Across Horace Mann League's activities, there are a variety of ways to **reduce cost, generate additional revenue, and increase the value provided to members**, including:
 - Reduce administrative and operational costs through digitalization
 - Secure corporate sponsorship for the annual luncheon and leverage social media to drive new memberships and donations
 - Introduce new content such as a sentiment brief into the newsletter and publications
 - Publish information about ongoing initiatives and issues on social media platforms, website, and newsletter

Organization Sustainability

- As the League looks to the future, it should take action to ensure long-term organizational health:
 - Develop a succession plan for Jack's eventual retirement
 - Update and document Board recruitment and governance processes
 - Build and foster partnerships with other organizations on specific advocacy goals
 - Create new content offerings with future funds for increased impact

Overview

Strategy Timeline

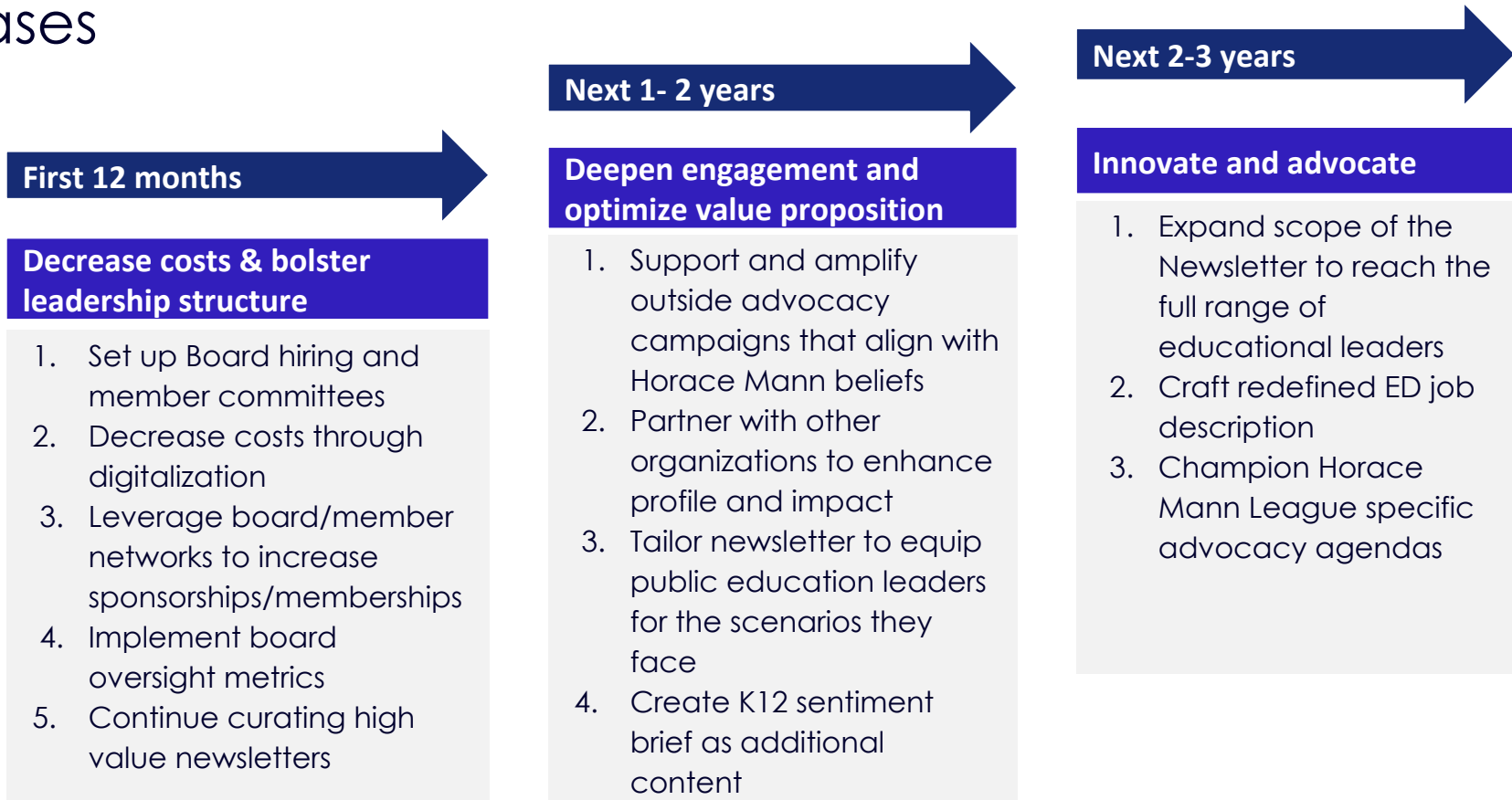
Value Offerings Overview

Value Offerings

- Membership
- Annual Luncheon
- Virtual Presence
- Physical Newsletter
- Sentiment Brief
- Advocacy

Organization Sustainability

Strategic recommendations will be rolled out in three phases



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Organization Sustainability

Developing impactful content for education and advocacy will strengthen the Horace Mann League's impact and reputation

Why is impactful content necessary?

Step 1

Using impactful content to target the right audience.

Step 2

Create a **Call to Action** in the audience, generating more leads from each content.

Step 3

Audience growth, more viewers, media and organizations pay attention to Horace Mann League

Step 4

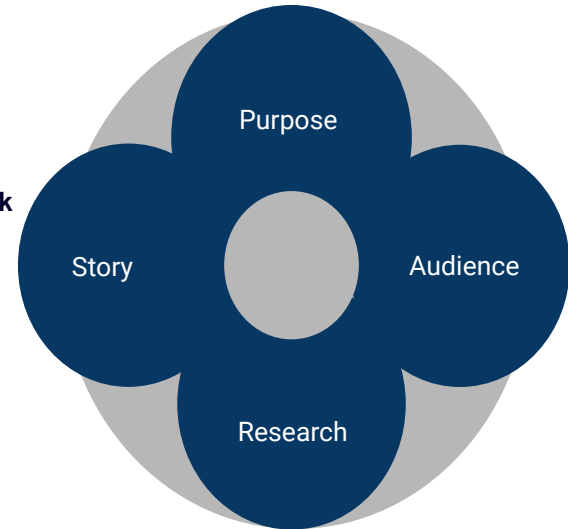
Build up reputation as a thought leader that changes public opinion and action

How to develop impactful content

What is the explicit objective of this piece of work? What will it get people to do?

Is the piece of work compelling? Does it build our awareness?

Who is this piece of work aimed at?



What is the validity of this piece of work based on? Who will see it as credible, and why?

The Horace Mann League should consider disaggregating the newsletter for faster consumption

Disaggregating newsletter content will allow readers to more easily share relevant information with their network.

Brevity:

- Many newsletters from popular sources limit articles to keep readers engaged to the most relevant articles.
- People struggle to take in a large number of things at once and could miss great articles in the clutter.

Examples:



Disaggregation:

- Large Media Sources will curate specific newsletters for different topics. (Politics, Sports, Entertainment, etc.)
- Dividing content into sections could direct readers to their preferred content faster.
- Content could be in separate emails or sections of the post.

Considerations:

- Dividing sections of the HML post based on: Leadership, COVID, Reopening, and other relevant topics.
- Send out focused small newsletters with members opting for only what they want
- Corporate sponsors for targeted newsletters regarding a specific subject.

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Context

Membership is the **lifeblood** of the Horace Mann League. Growth of the organization is synonymous with growth of the member base. For this reason is it very important that the administrative **process for application** be as **frictionless** as possible. In addition, the **benefits of joining** need to be **clearly defined and enticing**

Value Opportunities

Defining membership in terms of the **educational content and community engagement** that the Horace Mann League offers increases the appeal of the organization. Expanding membership to encompass a **diverse** range of individuals **working in the education field**.

Cost Reduction Opportunities

Digitized membership database nullifies need for physical payment reminders

Online application process removes costly physical communications

Revenue Increase Opportunities

Digitized membership database allows for **automatic payment renewals** which **retains more members**. Online payments in general attract a broader audience

Removing referral requirement allows more applicants to be considered

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The annual Luncheon is a beloved event, that provides a great experience for those who can attend, but financially **does not generate revenue** currently

Value Opportunities

The Luncheon can be a space to encourage **networking for members** as well as a chance to honor individuals in the industry, simultaneously **boosting the Horace Mann League's profile**, as well as a recruiting tool for other people at the conference

Cost Reduction Opportunities

Renegotiating contract could bring costs down, for securing the space or other aspects

Specific sponsorships could be secured (food, supplies, etc.) with companies that provide those services that could be given for free for the Luncheon

Revenue Increase Opportunities

Securing corporate sponsorships for the event can offset loss

Multi level sponsorship offerings can increase amount of total donations

*Sample sponsorship offerings

SILVER

\$1,000

- Logo in program and on website
- Logo recognition on promotional emails for event

GOLD

\$3,000

- Logo in program and on website
- Social media mention
- Logo recognition on promotional emails for conference
- Recognition as Premier Sponsor from the podium at conference opening and closing keynotes
- Add insert in program

PLATINUM

\$5,000

- Logo in program and on website
- Social media mention
- Logo recognition on promotional emails for conference
- Recognition as Premier Sponsor from the podium at conference opening and closing keynotes
- Logo visibility on attendee name tags
- Advertisement in Newsletter

Other Options

- Sponsors can pay for certain elements of the Luncheon (food, pens/notebooks, etc.)
- Could offer a speaking portion level, for top sponsor, depending on AASA contract

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Context

An organization's online presence, specifically **social media**, is a vital part of their **fundraising, marketing, and advocacy**. Currently, the Horace Mann League is using these tools, but has the opportunity to enhance their presence and **increase** the **reach and impact** of the org.

Value Opportunities

Using social media profiles and the website to publish original content, organizational information, and literature surrounding education issues, the Horace Mann League can **increase its national presence** as well as **sway public opinion** on various issues.

Cost Reduction Opportunities

Social media is already a very low cost tool

Revenue Increase Opportunities

Donation and **membership application links** can be displayed prominently on the website and posted frequently on social media

Tool to **attract corporate sponsors**, as well as part of value offering (advertisement)

An robust internet presence is vital to attracting interest and membership

	Website	Social Media
Rationale	<ul style="list-style-type: none"> • Conveys purpose and vision of the org • Source of most people's first impression • Recruiting tool • Educational tool • Connect the Organization 	<ul style="list-style-type: none"> • Nonprofits are reaching more people through digital channels than ever before. Email lists grew by 11%, while social media platforms grew much faster (Facebook: 13%, Twitter: 15%, Instagram: 44%) • Most popular use for non profits is information dissemination (news, updates, & education) - aligns perfectly for Horace Mann League • Tool for swaying public opinion (nonmembers)
Action Items	<p>Home page:</p> <ul style="list-style-type: none"> • Clear and succinct mission statement • Any other pressing information you would want newcomers to know • List of Horace Mann quotes is too dense for front page <p>Membership page:</p> <ul style="list-style-type: none"> • Create page near top of website for anyone interested • Easy and obvious application link • Member testimonials • High quality photos from luncheons and meetings • Membership overview (experience, perks, components, etc) • Active members have access to member list (transparency of the League's network) <p>Publications:</p> <ul style="list-style-type: none"> • Blog excerpts and other original publications should be integrated • Condense newsletters into one tab <p>General:</p> <ul style="list-style-type: none"> • High Quality imagery • Condense annually repeating content into one tab for each category (Newsletters, minutes, etc.) • Social media links • Include general information and resources to educate and enthuse public • Board member profiles 	<ul style="list-style-type: none"> • Focus on Twitter and Facebook <ul style="list-style-type: none"> ◦ Same content on both • Post links to blog or specific articles more applicable to general public <ul style="list-style-type: none"> ◦ Newsletter is main product, don't disseminate for free ◦ For blog posts, only include title or short description in actual post ◦ In future, promote book or other Horace Mann League produced content • Encourage donations frequently with links • High quality photos for all postings and content

Online donations (social media, etc.) are a significant and still growing revenue source

Building a strong online presence also generates intrigue for donations and corporate engagement

Trends / Rationale

- Online donations have increased from 14% to 16% from 2016 to 2017
- Social media is biggest driving factor for donations for Gen X and Millennials (2018)
- When people are engaged, actionable options (donations) need to be easy accessible and usable

Action items

- Promote donation link prominently on website - homepage and individual page
 - Current link is a non-functional image
- Create corporate sponsor page
 - Include perks for general sponsorships (as well as luncheon)
- Include examples of how donations benefit
 - Testimonials, content samples, etc.
 - Use social media for promotion

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The Horace Mann League currently **only produces an email newsletter**.

A print edition is in consideration as an additional touchpoint for members and a way to spread the organization.

Value Opportunities

Print editions can be displayed and discussed in public places to provide **awareness** of the league to new members

Mailed communication has a much **higher response rate** than email, this could increase engagement of the league.

Cost Reduction Opportunities

A physical newsletter would be an **additional cost** for the league only to be taken on when there is a surplus of funds

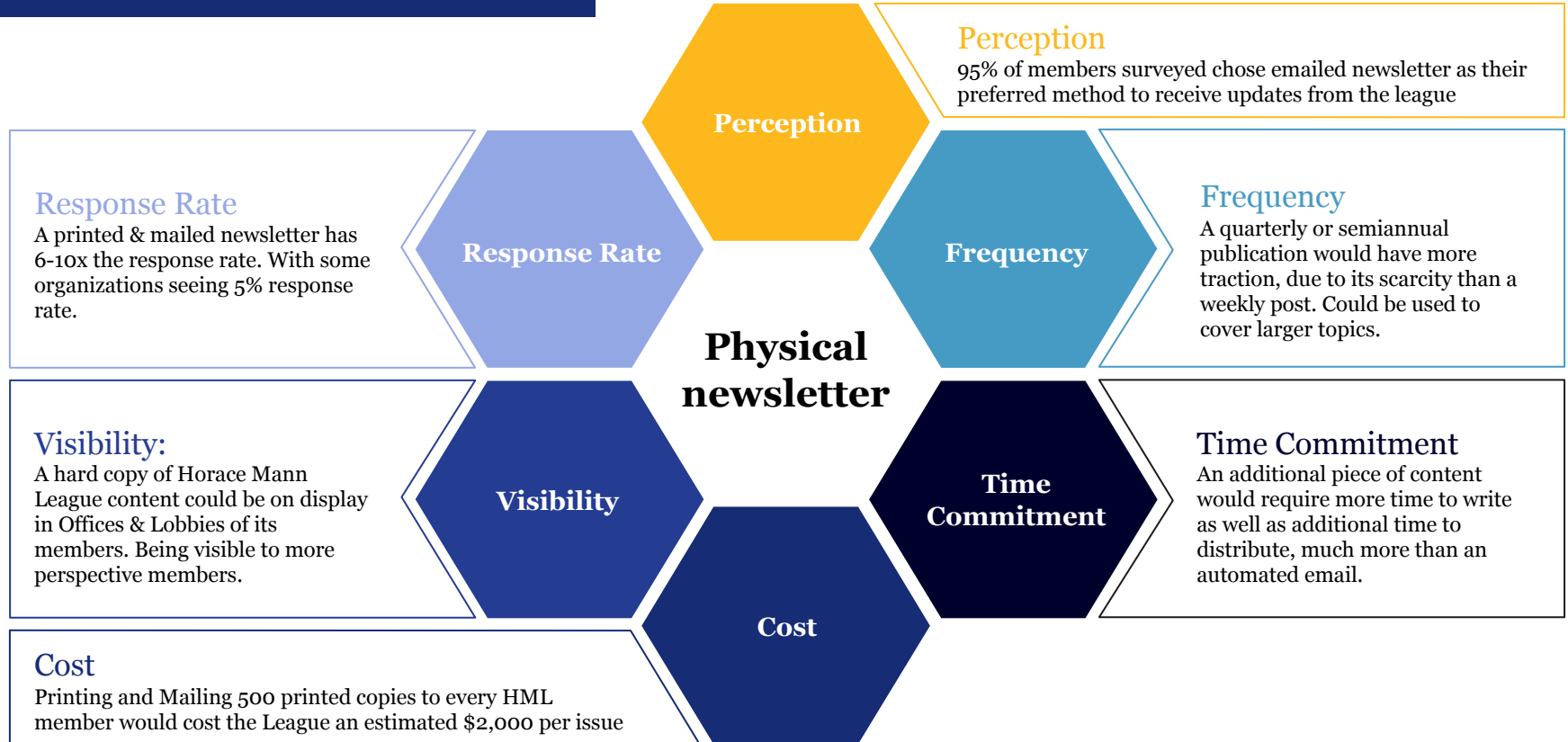
Sending only to members who request the print could reduce costs significantly.

Revenue Increase Opportunities

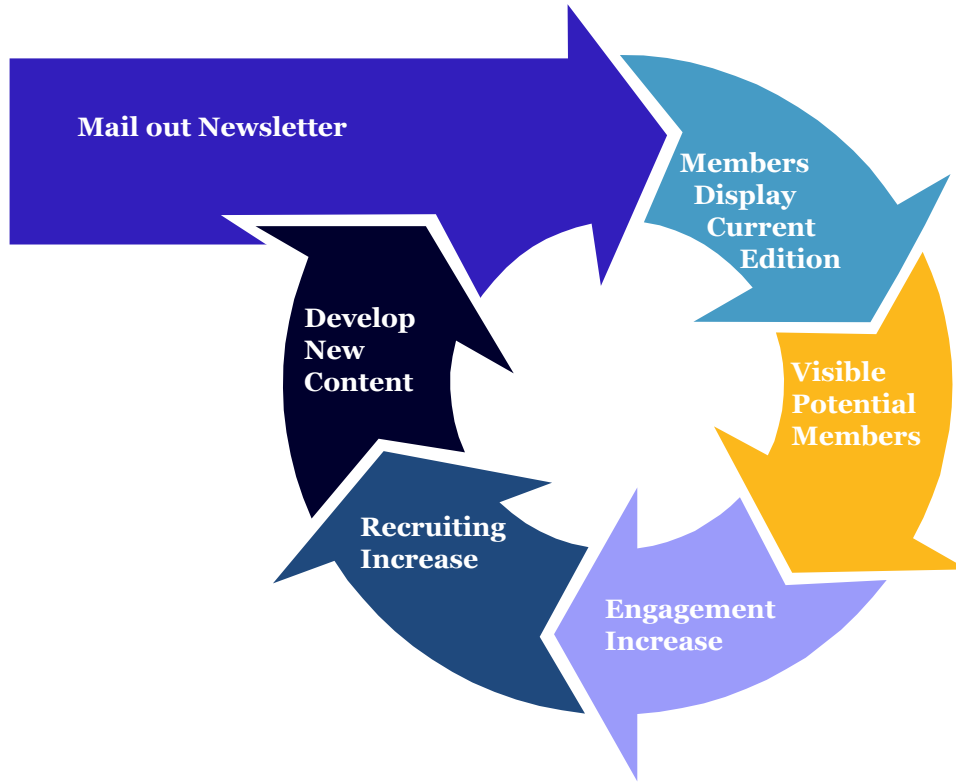
The visibility could **attract new members** to pay and join.

Selling the physical editions for a price could potentially bring in revenue.

Physical Newsletter



A Physical Manifestation of the League can help grow the organization



A annual or biannual print version of the HML Post could compliment the digital content

- Use original and well written work from the board and other members
- The physical presence in board rooms and offices will attract new members
- A flashy cover can spark conversation and spread the name of the Horace Mann League

Publishing each edition for desired individuals who would promote/have requested or purchased the content would offset price and save on printing.

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A sentiment brief is a publication of the **perspectives** from individuals to give people a different view on large scale news.

In the terms of k12 these perspectives could come **from students, teachers, principals, etc** who are involved or effected by any number of situations.

Value Opportunities

The value for members and readers to get a new piece of knowledge is large. To the extent we define the sentiment brief no **one else in the k12 space is publishing similar content.**

Cost Reduction Opportunities

Publishing a new piece of content would **cost the league a significant amount of money**, but if the value is seen by the community, new members and donations will arrive.

Revenue Increase Opportunities

A sentiment brief could constitute its own tier of membership, allowing members **additional value for additional donation.**
Additional content could attract additional members, who's dues would **bring in more money.**

Adding a sentiment brief and highlighting critical issues will provide additional value to members

Sentiment

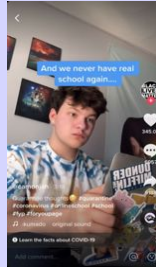
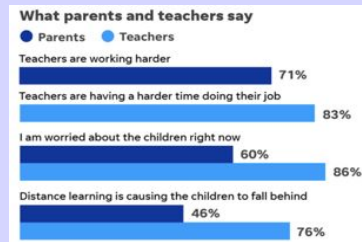
K12 Sentiment Brief

A collection of data and perspectives on current topics in K12 education. The content is scraped from social media, surveys, and polls that paint a picture of how the public is reacting to the current state of education and the information at hand.

Particularly useful for gauging perspectives and reactions on current topics regarding K12 education from:

- Students
- Parents
- Teachers

Sample Content:



Advantages

No one else in the field of public education news is doing this at the moment

Critical Issues

K12 Current Key Issues

A thematic breakdown of the key critical areas in the K12 industry as they are tracked over time.

The key critical areas in the current educational climate include:

- Educational Equity
 - Racial Inequality
 - Technology Gap
- Budget Cuts & Cares Act
- Reopening Scenarios
 - Learning Gap
- Alternative Learning Models
 - Distance Learning

A sentiment brief would provide new content to the K12 industry channels



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Context

The Horace Mann League does not have the **financial means to fund lobbyists**, or hold press conferences at this time.

Meanwhile there are many **other organizations and groups advocating for public schools**.

Value Opportunities

Partnerships and endorsements can spread the name of the league to **potential new members** possibly increasing the size of the membership.

Advocacy initiatives would be greatly benefited from having the support and backing from the **historic name of Horace Mann**.

Cost Reduction Opportunities

The financial impact of vocally supporting these initiatives is **extremely negligible** and would not impose any burden significant on the league.

Revenue Increase Opportunities

Partnering and supporting initiatives would spread the name of the league opening **opportunities for new members to join**.

The Horace Mann League can be a medium to amplify advocacy initiatives without detrimental costs

Advocacy opportunity

Description

Resource requirement

Impact

AASA Leading Edge Blog

- The Horace Mann League should take example from The AASA Leading Edge Blog and bring similar advocacy content to the newsletter
- The Public Policy Resources page directs users on where to get information and resources.

Alter/Add to the HML post to include a section with public policy resources

- Inform the members of legislation
- Unify support for initiatives

Support ongoing policy initiatives

- Use the broad audience of the newsletter to showcase individual initiatives & pieces of legislation affecting public ed.
- Post articles written by legislators and lobbyists working for public ed.

- Post articles written by lobbyists/advocates/legislators regarding policy.
- Ask passionate individuals to speak through the post.

- Inform the members of legislation
- Unify support for initiatives

Public Schools Week

- 66 organizations supported #PublicSchoolProud in public schools week (February 24-28 2020)
- Horace Mann League should officially support this action and partner with other movements like this when it is feasible.

- Contact the facilitators of Public schools week.
- Support the initiative through the newsletter
- Encourage members to support.

- Spread the name of the Horace Mann League.
- Bring another level of support to the public schools week initiative.

State Legislation

- Give members direct messages when important bills are in their state legislature

- Filter members by state
- Find state specific material when the issues arise.

- Brings the advocacy closer to home for the members
- Gives a focused audience for the material

Connect with other organizations

- Reach out to AASA Public Policy staff to be notified when partnerships are happening
- Publish results of PDK poll & their impacts
- Find other organizations with similar messaging

- Build connections with other organizations in the field
- Ask for permission to distribute material.

- More awareness of large initiatives in the field.
- Bolstering the network of the Horace Mann League

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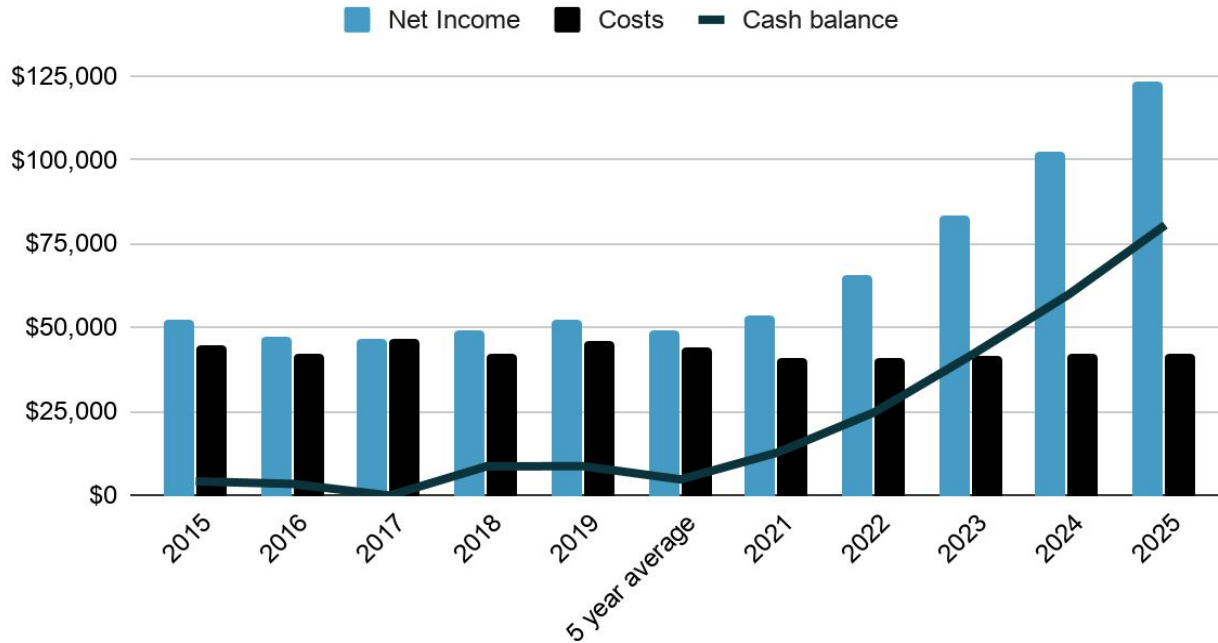
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Organization Sustainability

With financial security will stabilize the Leagues financials and allow the cash balance to grow

Cash Flow



Takeaways:

- Costs savings associated with membership will scale as growth occurs
- Excess income can be redistributed to content creation and events
- Financial stability will smooth the transition to a new executive director

A more structured and strategic recruitment process will improve the board's reach and effectiveness

Motivation

- From 2015-2019, **corporate donations** accounted for ~20% of Horace Mann League revenue over the 5 year span
- **Connections** on the board are necessary for continuing **corporate revenue streams**
- 64% of Nonprofit board chairs report dissatisfaction with board fundraising (2017)
- **Passion for mission** is most prioritized quality in board candidates according to executives and chairs (2017)

Action Items

- Conduct Board Self Assessment or Matrix
- **Identify weaknesses and gaps** of board performance, expertise, and experience
- **Define** job description and benefits for board member - tailored to ideal candidate
- Target recruitment for need filling

Recommendation: Superintendents could be a powerful tool to reach new members and corporations for sponsorships

Clear Board Governance can create alignment and ease engagement management

Objective: Effectively manage the board and create alignment over clear expectations in order to ensure active participation and engagement accountability to maximize organizational impact under limited resources

Implementation: Outline key responsibilities as they align with the organizations mission and values, then track engagement metrics for each member

	Vision	Recruitment	Finances
Engagement Goals	<ul style="list-style-type: none">• Set up hiring committee for eventual secession• Carry out missions to help current educators (Education Heros)	<ul style="list-style-type: none">• Recruit 5 members to apply annually• Set up membership committee• Promote large scale growth (institutional memberships, and the like)	<ul style="list-style-type: none">• Pursue 1 corporate sponsorship annually• Set up fundraising committee• Support the League financially based on individual resources
Dashboard: Management Metrics	<ul style="list-style-type: none">• Updated and aligned in Mission + Values• Support current missions or find alternatives• Carrying out the mission of HML to improve education and educators	<ul style="list-style-type: none">• Expectations clearly stated in Board member Role• Track individual contributions in individual member tabs	<ul style="list-style-type: none">• Expectations clearly stated in Board member Role• Track individual contributions in individual member tabs

A common document for board members to track their progress and engagement would help keep people on track

- Members will maintain their personal dashboard to track their efforts in recruitment, corporate donations, and personal financing efforts
- Individual board members will have access to the dashboard of other board members
- Target dates for completion will be set to keep members on track with their commitments
- Complete dashboard template will be sent along with the final materials

PURPOSE

We need a way to communicate what we are all working on in a cohesive manner. Therefore, we came up with the idea of inputting important info for all board members to access. We will still plan periodic check-ins, but will use the information in this document to help everyone stay connected to you more often. Everyone on the team is expected to update their individual dashboard on a monthly basis.

As you're updating your dashboard each week, please think about 1) Activity Goals and 2) Key Results. Here are some examples.

Operational goals -- These are the goals having to do with the organizations metrics, for example, plans to reach out to specific school districts or corporate donors

Aspirational goals -- In contrast to the operational goals, these goals are bigger picture ideas about how we are going to go about supporting the public education system.

HOW TO

At the end of each month, you will fill out your dashboard tab to keep everyone in the loop on what you are working on, what you have coming up, any extra capacity you have, donations, member recruitment, and general info you want to communicate.

TAB DESCRIPTIONS

(1) MISSION + VALUES lays out the overarching purpose of the League and the core values based on the methods of Horace Mann.

(2) ROLE EXPECTATIONS clearly states the role of board members and their expected contributions to the organization

(3) INDIVIDUAL BM tabs are updated at the end of the month. This is our database and way to track who is working on what. If we get another business process improvement we can go back to this tab and see who worked on a similar project previously.

When Jack retires certain measures will need to be taken to smooth the transition

Timeframe



Some early steps can be done concurrently, but the transition process will likely take at least 6 months



Thank you