



PREPARED FOR:



Strategic Planning Report



VISTA COVA
Facilitating Vision, Strategy
Connection, and Value

**YOUR
VISION.**

**YOUR
STRATEGY.**

**YOUR
COMMUNITY.**

**YOUR
VALUES.**

VISTA COVA

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Introduction

In November 2021, leaders of the Texas Association for School Nutrition (TASN) gathered to discuss the current position of the organization and opportunities for the future. Equipped with insight gained during their pre-retreat session, the participants approached the strategy retreat having identified the opportunity for TASN to leverage technology and its network of members to strengthen member recruitment; investigate root causes preventing interest in leadership development and/or succession; and reimagine opportunities for greater operational stability and focused member engagement.

TASN is in a solid position to envision its future and is in a valuable position to reinforce itself as an advocate for school nutrition at local and state levels and convener for those interested in networking, advocacy, and education around school nutrition. As TASN's future evolves, leaders should utilize its new strategic plan to remain aligned when deciding between competing priorities, partnership opportunities and which, if any, will receive TASN's attention, financial and resource investment.

3-Year Vision

The participants began the session by describing individual visions of TASN as a thriving, successful organization three years from now. A full listing of what was mentioned in those visions is included in [Appendix A](#), and the key areas of alignment included:

- Board composition is representative of all regions of Texas with strong presentation as the representatives for all matters related to Texas' school nutrition
- Technology is embraced and leveraged to expand the format and volume of educational opportunities, networking, and marketing to increase member engagement, communication, and public awareness
- A focus on relationships with all stakeholders – service providers, vendors, legislators etc. to reinforce TASN as an essential contributor and partner
- Creative, innovative strategies for member growth with ultimate goal of widespread membership throughout the state of Texas

Action:

- With some time since the retreat, the Board can consider the above bullet points and refine/prioritize them as it sees fit, summarizing the picture of the organization they are working to create.
- The Board can choose to include the above list as an addendum to future Board agendas, serving as a guidepost of the organization they are trying to build.
- This summary vision can also be included as a piece of new Board member orientation, inviting those joining the Board to have a conversation with continuing members about where this vision aligns with their own for TASN, and where they have unique additions.
- The group vision can also serve leadership as a base of 'talking points' to share with fellow leaders and members, telling the story of where the association is headed and inviting them to join in the journey.

Mission and Vision

The participants reviewed the current vision and mission statements and concluded new versions should be crafted to align with the vision of the future organization as described above. What follows is the group's final draft of each:

Draft Vision Statement

- Positively impacting the health and education of Texas children through nutrition

Draft Mission Statement

- Our mission is to empower and support the community of school nutrition professionals in advancing the accessibility and quality of Texas school nutrition programs

Action:

- The officers and senior staff should review the proposed vision and mission statements and present to the Board – taking into account the discussions that occurred during the strategic planning retreat.
- The Board will review, amend, and vote on a revised vision and mission statement.
- The organization will incorporate the new statements into its materials and operations and the Board should decide how the statements should integrate into regular Board use.

Resonating Themes

Many groups engage in a brainstorming activity to identify additional resonating themes by which all goals should be measured. The TASN group began the process, outlining thoughts that can be found in [Appendix C](#). The officers and senior staff may review and/or further refine the initial themes and decide the best options for consideration by the Board – taking into account the discussions that occurred during the strategic planning retreat. From there, the Board will review, amend, and vote on the final goals and objectives created during the strategic planning session, which should be designed and evaluated with the resonating themes in mind.

Strategic Priority Areas

Next, the participants discussed and identified three priority areas of focus for the organization in the coming three years. For each area they authored goals that served as definitions of the area alongside 3-year of success in each area. While the full work can be found [in Appendix B](#) the three strategic priority areas authored were:

- Membership
- Professional Development
- Advocacy

Action:

- Staff should refine the areas identified with their cascading goals and indicators to align what was authored to current efforts and capacity, along with removing any areas of duplication.
- The refined framework should be shared with the Board and used as a basis to build a parallel operational plan.

Conclusion

During the strategy retreat, TASN leaders produced several tools to guide the success of the organization over the coming years. As the Board considers and refines the output from the retreat, the following opportunities for further exploration exist:

- Finalize and adopt a new vision and mission
- Refine and adopt the new strategic priority areas with their goals and indicators
- Build a parallel operations plan that aligns to the priority areas
- Establish a regular system of measuring impact or programmatic impact against mission and finances
- Design a strategic communication roll out for the new strategy elements, sharing them with the membership, legislators, and allied organizations
- At the start of the session, the assembled leaders engaged in an exploration of governance best practices. The leadership should return to this topic for further refinement of board evolution possibilities.

Appendix A: Three-Year Vision Elements

At the start of the strategy retreat, the volunteer leaders created the following descriptive listing of elements of a successful TASN in three years.

- Technology is key to advancing the association (i.e. online classes, website functionality, and purchases, election voting QR codes)
- Conduct from members to solutions, or products or training, to get resources they need
- Resource to share TDA and SNA and be the resource members look towards for the info they need for the profession
- Board represents the state and from a variety of geographic regions
- Members from a variety of education levels and backgrounds
- Offering in person events and product shows, not all online
- (ED/Staff - technology, bring back value to members, community outreach to grow membership as we're lacking in area reps, we have 4 of 12 right now, restructure board and HQ, grow, election process revamp)
- Year-round professional development online and in person, not just summer conference, could be Friday afternoons
- Working relationship with stakeholders, service centers, and the state overall, bridge the gap
- Virtual showcases, go to them for membership drive or engagement
- Technology - engage so membership works for our members
- Leveraging technology due to covid - social media, zoom, QR codes, texts, to stay relevant as Texas
- Literate - bi literate and bilingual - not just Spanish and we're only in English and need to accommodate
- Look at membership and rotate our events or meetings across the state
- Target communications for directors and various audiences to create relevance at various levels
- Strong affiliation with vendors and TDA and legislators, and in real time - here's what TASN is doing for supply chain (for example...) - acknowledging issues and how we're addressing, not necessarily fixing
- All over TX membership
- Take advantage of partnership for regional classes - there is an opportunity here
- Creative approach to membership growth - volume discount for districts perhaps Rewarding new members with a drawing at the conference to create excitement
- Need marketing to different stakeholders and to directors, who don't see the value of TASN since they take the lead in developing the desire and ability for employees to come to meetings and have membership
- Develop chapters, we used to do more to help them function and thrive to grow our membership
- Pride of being a member - what does membership do for them, how can they share and tell others about it too (our mission and vision should be right on the front of the website)
- Talking to ESCs we need to get feedback and listen
- Certification used to be so important and having that card, not sure if its harder or they aren't as proud, or districts quit giving incentive, can we get with districts to promote this again
- Collaboration - I think of industry, front line workers and staff, how can we reconnect with each other again and working together - leadership needed, its currently disconnected
- evolve
- organized

- focused
- adaptive
- community
- technology driven
- collaborative
- Innovative professional organization, dedicated to the evolving nutrition and developmental needs of Texas children.
- Very diverse membership rep all areas of TX - addressing language and Spanish too
- Where members are proud and quick to exclaim membership in TASN
- Members can easily join and renew and check cert status
- Paid staff positions are staffed with well qualified and appropriate compensated long term team members
- All volunteer positions are filled with the diverse and represented group of members
- TASN is known for exceptional service to members
- 2-3 members running for office each year
- Technology improves significantly for members and board experience
- Make board service easier and less time consuming
- Annual member satisfaction survey
- Communication to board from members and build that connection - with technology or single touch to help them feel their place as members
- Common thread of Texas children (and Texas vendors) from all stakeholders - that's what makes people wake up to go to work each day for a thankless job
- Creating community and developing each other to serve the common goal - we belong, we get something out of it, its rewarded, acknowledged, that's what people show up for and I want to be part of that...looks fun, exciting, purposeful

Appendix B: Goals, Activities, Indicators of Success, and Metrics

As the staff and leadership consider the following, the visions of success along with the vision and mission statements of the organization should remain top-of-mind. The following definitions should guide the review and revision of the chart below:

- **Area of Focus:** What are the key priority areas where the organization should focus its resources to advance mission
- **Goal:** What are we trying to achieve in this area of focus?
- **Indicators of Success:** In 3 years, how will we know we have accomplished/advanced our goal?
- **Strategies:** What are high level areas for resource investment that will make the previous success statements a reality?

Area of Focus	Membership
Goal(s)	<ul style="list-style-type: none"> • Improve member experience and value
Indicators of Success	<ul style="list-style-type: none"> • Continuous growth annually in membership • Improved scores on annual member satisfaction survey • Increased participation annually at in-person events • Increased number of active chapters annually
Strategies	<ul style="list-style-type: none"> • Young Professionals group for networking, giving unput for future association events • Gather data on what is valuable to members • Customer service metrics/evaluation for headquarters • Technology improvements at headquarters to provide online membership services • Hold board meetings in targeted area of the state • Evaluate efficacy of conference experience overall for changes • Training at different areas of the state • Incentives for new chapters for excitement, competition (celebrate new chapters)

Area of Focus	Professional Development
Goal(s)	<ul style="list-style-type: none"> • Develop and distribute competitive and relevant education to members with multiple delivery methods with high quality instruction and technology integration

Indicators of Success	<ul style="list-style-type: none"> • Increase in certified members and renewals • Our professional development and certification program are seen as being very valuable, therefore participation increases • Members can easily access the certification process through the TASN app or website
Strategies	<ul style="list-style-type: none"> • Partnership with ESC's to increase awareness of TASN certification (use of their classes towards such) • Align ICN and ESC courses with requirements for certification • Add an Industry Certification program • Multiple languages for classes • Marketing of professional development and certification programs to Superintendents and Directors • Simplify the certification levels and timelines so that they are easier to understand • Update our Technology so that certification can be tracked through it

Area of Focus	Advocacy
Goal(s)	<ul style="list-style-type: none"> • Promoting and educating the community at large on the importance of child nutrition programs for successful learning outcomes for Texas children
Indicators of Success	<ul style="list-style-type: none"> • Elevate the role of child nutrition professional through proactive presence and timely information sharing through multiple communication channels to members in real time • Expanded and expected TASN Day at Capitol and include TASN as a resource as part of decision making • TASN large scale contribution at SNA-LAC
Strategies	<ul style="list-style-type: none"> • Bilingual staff member to research, produce, and manage TASN branding communication and marketing plan to each stakeholder (TDA/Legislative, Directors, Supt, workers) • Staff role at TASN redefined to include legislative advocacy and district engagement • Engaging members to connect with community stakeholders through virtual coffee hours/talk

Appendix C: Resonating Themes

- Member experience
- Utilize technology fully
- Save labor
- Clarity on how to be certified
- Market value of membership to directors specifically
- Increase chapters across the state
- Increase Spanish class availability
- Have bilingual staff member at HQ
- Drawing/incentive for new members or new chapters each year
- Increase online and in-person certification opportunities
- Simplify it and make aligned to ICN courses to help with access to courses, industry too
- Have a presence at ESC workshops and use them as a marketing partner for new members, use them for teachers at summer conference
- Beef up marketing brochures and promote advantage of having certified staff members to the district program
- Larger, stronger association
- Efficiently run organization with the capacity to easily scale as needed
- Improved program quality through relevant educational programs with facilitated access
- Strong internal industry presence as well as external industry recognition