The NAfME Strategic Plan

and

Budget

FY 2015-2016

Approved by the

National Executive Board

May 19, 2015
Adopted: January 1, 2011

NAME’s Mission
The mission of NAME - the National Association for Music Education is to advance music education by encouraging the study and making of music by all.

NAME’s Vision
All students will receive a comprehensive, sequential music education that prepares them for lifelong involvement in music.

### Advocacy
- Inform and activate the public, policymakers, and educational leaders to support music as core in the complete education that must be available to all students so that they can succeed tomorrow.

### Serving the Profession and the Music Educator
- Engage music educators in association programs, projects, events, and professional development opportunities that serve not only their needs, but those of their students and the profession as well.

### Research
- Ensure that sound data and research inform all activities of the association.

### Organizational Vitality
- Serve the needs of constituencies through sound fiscal practices and aligned implementation of our culture, systems, structures, and resources.

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a. Develop and maintain comprehensive coalitions, strategic alliances, partnerships, and sponsorships to advance arts education and the arts
b. Influence the legislative and regulatory environment to support music education and educators
c. Identify and strengthen strategic messages to support music education and educators

a. Forge strong partnerships with state and national music and arts education organizations
b. Ensure that the association has the technological capacity to deliver member services effectively and efficiently
c. Provide resources, materials, publications, and virtual learning opportunities to further professional and personal development
d. Provide periodic updates to the National Standards, Opportunity to Learn Standards, and related assessments.

e. Create and support partnerships between researchers and practitioners to improve practice and expand knowledge
f. Foster research development

g. Share research and knowledge with internal and external audiences

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a. Build and maintain relationships that enable the Association and state MEAs, societies and councils, and individual members to accomplish differentiated goals within a unified national structure
b. Increase membership in every category
c. Develop national and state leadership
d. Ensure a fiscal balance

e. Secure funding to conduct projects through the “Give a Note Foundation”
f. Excel in our values in all programs and projects.
**Strategic Plan 2011 - 2016**

**NAME’s Preamble.** Music is a universal expression of the human spirit; a basic human need. It allows us to communicate our deepest ideas and feelings; to explore and preserve our cultural heritages; and to celebrate the realms of emotion, imagination, and creativity that result in new knowledge, skills, and understanding. Therefore, every individual should be guaranteed the opportunity to learn music and to share in musical experiences.

**NAME’s Mission.** The mission of NAME - the National Association for Music Education is to advance music education by encouraging the study and making of music by all.

**NAME’s Vision.** All students will receive a comprehensive, sequential music education that prepares them for lifelong involvement in music.

**NAME’s Goals.** To advance music education by encouraging the study and making of music by all, NAME has four major goals.

- Every student in our nation’s schools shall study music as part of the core curriculum.
- All school music programs shall be balanced, comprehensive, and sequential, as defined in the National Standards for Music Education and shall be provided with resources as defined in the Opportunity-to-Learn Standards for Music.
- All school music instruction shall be delivered by or supervised by well-prepared professional music educators, each of whom meets state requirements.
- Music educators and those who support music education shall view NAME as the primary association for ensuring the widespread advancement of the profession.

**NAME Values.**

**Opportunity:** We believe that music is for all. Students must have an opportunity to learn and participate in the joy and power that music education brings in uplifting the human spirit and fostering the well-being of society. Music education provides students with learning in creativity, literacy, and life skills.

**Comprehensiveness:** We believe that music education must provide opportunities for students to develop not only their music-making skills, but their abilities to create and to respond to music as well.

**Professionalism:** We believe that a well-trained music educator who meets the highest professional standards is critical to providing students with a comprehensive, balanced, and sequential program of music. A professional is engaged and committed to rigorous teaching, dedication of time, advocacy, and service.

**Research:** We believe that students are best served through research-based practices that support music educators’ instructional decision making, as well as historical and philosophical research that provides perspective in designing curriculum to meet the needs of students and communities.

**Collaboration:** We believe that partnerships with arts educators and likeminded groups, parents, families, communities, and other stakeholders are essential for organizational and student success. We believe we are individually and organizationally strengthened by working together to promote music, music education and policies that build a better society for all.

**Leadership:** We believe our organization is most influential and effective when we achieve seamless integration among state, division and national administrative structures and leadership teams.

**Responsibility:** We believe individually and collectively taking all practical and appropriate action steps to achieve the stated goals of the organization.

**Strategic Directions.**

**Advocacy:** Inform and activate the public, policymakers, and educational leaders to support music as core in the complete education that must be available to all students so that they can succeed tomorrow.

**Serving the profession and the music educator:** Engage music educators in association programs, projects, events, and professional development opportunities that serve not only their needs, but those of their students and the profession.

**Research:** Ensure that sound data and research inform all activities of the association.

**Organizational Vitality:** Serve the needs of constituencies through sound fiscal practices and aligned implementation of our culture, systems, structures, and resources.
## Budget Contents

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I. Organization

The Strategic Plan of the National Association for Music Education rests on four Strategic Directions. The functional management of the Association – including the organization of the budget -- is divided into three Centers.

The Strategic Plan and the budget do not, however, correspond on a one-to-one basis. Instead, we are able to provide both fiscal control and program direction by requiring that our programs, in aggregate, serve the Strategic Plan in ways that cut across the functional centers we have established. Each of our three centers shares responsibility for meeting the totality of the Strategic Plan.

That said, there is a general correspondence between the Strategic Directions and the functional Centers:

<table>
<thead>
<tr>
<th>Strategic Direction</th>
<th>Functional Center</th>
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<tr>
<td>Advocacy: Inform and activate the public, policymakers, and educational leaders to support music as core in the complete education that must be available to all students so that they can succeed tomorrow.</td>
<td>CACE: Center for Advocacy and Constituency Engagement</td>
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<tr>
<td>Serving the Profession and the Music Educator: Engage music educators in Association programs, projects, events, and professional development opportunities that serve not only their needs, but those of their students and the profession as well.</td>
<td>CMRD: Center for Marketing and Resource Development</td>
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<tr>
<td>Research: Ensure that sound data and research inform all activities of the association.</td>
<td>All centers</td>
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</table>
| Organizational Vitality: Serve the needs of constituencies through sound fiscal practices and aligned implementation of our culture, systems, structures, and resources. | All centers, but particularly:  
  - CMRD: Center for Marketing and Resource Development  
  - Executive Center                                        |

Activities budgeted by the board (planning in the light of the Strategic Plan) and carried out by volunteers and staff (working within the structure of our Functional Centers) are reported out frequently via several avenues, including: minutes of the National Executive Board, messages to leadership on the “NAfME Recital” closed system, and messages to all members and beyond in our “Orchestrating Success Newsletter,” on our web site, in our print periodicals, and in other venues.

As in any well-run enterprise, those activities do not occur at random. Rather, they are the result of careful planning that involves the development of measurable outcomes, or metrics, for each major area of activity. Those areas are known internally by the acronym “PPEC,” which stands for Programs, Projects, Events, and Campaigns. These PPECs are hosted by our functional centers according to the scheme presented in Table 1 (Note that PPECs are often grouped into categories that make sense for internal management, such as “outside advocacy” or “constituent advocacy”):
| CACE | • Member & Student Experiences:  
|      |   o MIOSM  
|      |   o Hill Day  
|      | • Public Policy  
|      |   o Lobbying  
|      |   o Research  
|      | • Membership Growth & Development  
|      |   o Campaigns  
|      |   o Volunteer Development  
|      |   o Collegiate  
|      |   o Associate  
|      | • Business Processes/Membership Processing  
| CMRD | • Strategic Relationship Development  
|      |   o Collaborations  
|      |   o Corporate Relationships  
|      | • Capacity Building  
|      |   o Advocacy  
|      |   o Resource Centers  
|      | • Member & Student Experiences  
|      |   o Biennial Conference  
|      |   o In-Service Conference  
|      |   o Performance Experiences (Honors Ensembles, USAAAMB, WLC)  
|      |   o Tri-M  
|      | • Brand Management  
|      |   o Marketing Communications (External and Internal)  
|      |   o Digital Media (Social Media and Web)  
|      | • Publications, Non-Juried (Teaching Music, Broadcast Email, News, Books)  
|      | • Development  
|      |   o Grants  
|      |   o Fundraising  
|      | • Give a Note Foundation  
|      | • Restricted Funds/Scholarship funds  
|Executive | • Capacity Building  
|         |   o Organizational  
|         |   o Societies & Councils/MEAs  
|         |   o National Assembly  
|         | • Member & Student Experiences/Awards, Honors, & Recognition  
|         | • Public Policy/Standards & Evaluation  
|         | • Organizing/Association Mergers & Relations  
|         | • Publications/Juried  
|         | • Governance  
|         |   o NEB  
|         |   o Divisions  
|         | • Consultancy (Solutions Music Group LLC)  
|         | • Internal Systems  
|         |   o IT  
|         |   o Facilities  
|         |   o HR  
|         |   o Finance  
|         |   o General Administration  

Table 1. PPECs by functional Center
II. Goals and Controls

The overall budget proposed in this document projects a net income with total revenue of $8,196,965 and total expenditures of $8,159,840 giving a net income of $37,125. This balance has been arrived at by making choices detailed under each PPEC below. Some important points and options discussed by the Executive Committee are:

Points:

1. We have kept to the plan for using digital distribution of MEJ as scheduled. Part of the differential in expenditures is put toward the research fund previously set up by the board.
2. Included in the budget are:
   a. A marketing survey to update and expand on the data gathered two years ago.
   b. Money for producing some brief videos to carry forward central ideas of NAfME and our PPECs.
   c. Money that may be necessary in personnel expenses if proposed rule changes come to pass regarding classification of employees under Federal law.
   d. Targeted investments in promotion of the following programs, using a planned mix of electronic and surface-mail pieces:
      i. Collegiate
      ii. Tri-M
      iii. In-Service Conference
      iv. Solutions Music Group
   e. Plans include new books on standards, and a reissue of the Teacher Evaluation books. This is reflected in royalty income in the book publication program.
   f. Plans to work on both legislative and administrative support for standards-based education in the states.

Potential additional income
1. We may be able to rent out office space. We are not counting on income from rental of space in our facility. With our current tenants moving out, we hope but are not certain that we will be able to let the space. Any income from rentals, if realized, will go to build our reserves.
2. Solutions Music Group may realize additional income.
3. The budget cannot easily accommodate additional expenditures without additional revenue-producing projects.
In carrying out the Strategic Plan of the Association within the limits set by the budget, staff and volunteers alike carry out a great variety of tasks. Some of those tasks have become relatively routine over time, and are listed in the following pages simply as “activities” under each PPEC. The desired outcomes for these activities can generally be summarized as maintaining quality of effort along established patterns, within budgeted resources. Note that for our Association, as for systems of education, the key resource is often the time that needs to be spent to keep things running. But time, as the saying goes, is money, and that time is both budgeted and tracked on weekly timesheets submitted by all staff.

Within each PPEC, we have targeted some important metrics. These metrics are not meant to be used in evaluating all task outcomes accomplished within a given PPEC, but are instead designed to help us focus on key outcomes. Many, but not all, of these outcomes are new to us; each and every one of them is important to our current and future success as an organization.

The metrics are of two kinds:

- Lead indicators are objectives over which we have significant control. That is, they are measurable actions that we can take and are essentially the same as “enabling objectives” in education.
- Lag indicators are measures of the eventual effect of our actions – and measures that we presume will ensue if we are able to implement the lead indicators properly. These are the same as “culminating objectives” in education.

Staff will be engaging in ongoing analysis of our progress toward these indicators, and will report to the National Executive Board on that progress at each NEB meeting. Unless specified otherwise, the metrics are meant to be active for the fiscal year July 1 – June 30.

Overall, this system of using metrics and functional centers to drive activities leads to the following breakdown of expenditures by Strategic Direction:
Chart 1. Proposed Budget Expenditures by Strategic Direction.

In determining what tactics will be most successful in meeting each strategic direction, we have collected and continue to collect information. We continue to use data from the 2014 survey conducted for us by Gelia, which includes the following information (coded as responses from members (M) and nonmembers (NM):

- Primary Perceived member challenges are (M and NM):
  - Interference with music program by pullouts
  - Demands for teaching ELA and other subjects
  - Lack of sufficient time with students
  - Lack of supervisor understanding of music program
- While vast majority primarily read publications in hard copy, 80% are somewhat comfortable (or more) in receiving publications digitally (M)
- Magazines, conferences/seminars, and our association are key sources of information for music teachers
- While our publications were the most recognized benefit of NAfME membership, they are value-ranked 8th out of 11 benefits listed (M)
- Members identify us with
  - Subscriptions
  - Advocacy
  - Festivals and competitions
  - Professional development
More recently, we conducted a poll of leadership in the NAfME family of associations. Forty-six leaders responded. The priorities assigned to the areas in the survey (chosen to represent the main areas of endeavor currently listed in our budget or indicated as somehow important in other polling) are represented in the following chart:

Full titles for, and comments about the various areas are of interest in interpreting feedback. These comments were:

**Strategic Relationship Development**
- Characterizing as unimportant does not signal my actual feelings, which are a deep mistrust of public/private partnerships. I think it becomes very easy to lose sight of the membership and our history as an organization for public school music teachers when we go after these.

**Capacity Building (for advocacy, organizational, resource centers, societies and councils/MEAs, National Assembly)**
- And I think the materials, resources, etc. have to be free or very low cost to members
- This is at the heart of the national association

**Professional Development**
- specifically how to use the standards in your own classroom
- *For whom? For the leadership? I answered neutral because I am not sure what is meant here
- With the new standards, this will be important to keep at the top of the list
- Better handled by the states.

**Member & Student Experiences (conferences, honors ensembles, MIOSM, Tri-M, Hill Day, awards & recognition)**
- miosm perhaps less so
- I think a lot of members feel like NAfME is out of touch with their situations and needs.
- Be careful to not put too much emphasis on something that affects a small percent of the members.

**Brand Management (marketing/communications, social media web)**
- no responses

**Membership Growth and Development (campaigns, volunteer development, collegiate, associate)**
- And the way to do this is to show the membership that you offer something of value and that you are on their side. And the members are primarily practicing teachers, right?
Organizing (Association Relations)
- Not completely sure what this means.

Publications (Juried & non-juried)
- Juried? You mean peer reviewed, right?
- Be sure entire membership and true changes in teaching are being served by research publications

Solutions Music Group (consultancy to schools & districts)
- I am infuriated by solutions music group. It screams conflict of interest. Here, let's trot out a new set of standards because... you know, standards? And let's make them unpopular and convoluted. And then, we can retire and charge consulting fees to teachers and districts who are struggling to make sense of them. And keep in mind: I am not necessarily anti-standards, and I am a proponent of NAfME, which I think can be a tremendous ally for music educators. But this SMG thing STINKS.
- I think this is a bad idea. Honestly, I don't think new standards are all that great—confusing to many. I think a revision of the original standards would have been fine—and would have erased the need for "Solutions Music Group" to sell services on how to understand the new standards we didn't need.
- This could in time generate funding for us.

NAfME has been urged to focus on sociocultural diversity in the music teacher population. Please rate the importance of this focus.
- need more information
- Increasing diversity of the school-aged population and increasing segregation of school populations makes this a critical need.
- AND diversity in students served.

Are there any programmatic areas not covered above that you believe we should be addressing through budget-enabled activities?
- That looks pretty good!
- No. This is a full plate. Perhaps more than we can afford.
- If I missed this, I apologize, but I would like to see a greater focus on Developing Leadership in the states MEA's.
- Very difficult to get young teachers involved - and help those who are willing to develop a stronger skill set. At the same time - increasing membership in small states like Nevada is becoming increasingly difficult. These 2 areas seem to be like the chicken and the egg syndrome.
- I believe that we are on the right path. More of the same is not bad in this case, if we continually assess effectiveness.
- No others at this time.
- I don't think that a survey of this type can produce interpretable results, and I know I can't meaningfully assess the relative importance of the items on the list, having no information about our organization's current investment in each of these areas nor any idea about what's being considered. I realize that this may be offered simply as a place to begin a discussion, but unless personnel and financial resources are laid out more clearly, it seems impossible to gather meaningful input from the leadership.
- No
- Web-based resources and reference. NAfME App
- A comment - student experiences, prof devl and publications are important for the profession. But the MOST important need now is advocacy, policy and building capacity in those areas. It's also important to understand what is available in other organizations, and focus on where our organization has the strategic position to really impact
- It would be easy to put "5" on all of the above...they are all vitally important.
- Most all the items listed above all right in line with our Strategic plan.
- Always supporting (and increasing that support) of state and divisional efforts. They don't have the resources in many cases.
PPEC Budgets, Activities, and Metrics

As each PPEC plays a vital role in meeting our Strategic Directions, we balance the budget for each PPEC with the expected outcomes of that PPEC. The budget breakdown by PPEC may be summarized as shown in Table 2 on the following page. Note that the expense figures in this table, and in the tables throughout this document, reflect the proportional allocation of overhead and administration to the various PPECs.

“Allocation,” in this case, means the spread of costs for administration (including executive staff and governance, e.g., NEB, National Assembly, Division Boards) and overhead (cost of maintenance and services to the Headquarters Building, service to the existing IT infrastructure, and similar costs) across the PPECs. As these are baseline costs for the association, the ultimate cost of each PPEC includes a share of these allocated costs.

Note that data for the past year’s budget in this chart do not foot exactly. This is because we have revised the organization of PPECs, and some categorizations of past years do not fit smoothly into the categorization moving forward.
Table 2. Summary of budget by PPEC, with allocated overhead and administration.

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Those budget numbers must be viewed in terms of the activities and outcomes to which the funds are directed. Tables 3 – 30, located on the following pages, summarize these details. In viewing these tables, please remember that the metrics stated are meant to drive new, innovative, and essential outcomes. Other outcomes are expected for each of the activities listed; those outcomes are, for the most part, evident in the description of the activities. For ease of reading, the budget for each PPEC has been stated as Net Budget (income less expenses; numbers in parentheses represent deficit figures for the PPEC, meaning a net expense).

Note that all numbers in red, contained within parentheses, are negative numbers, and thus represent a net expenditure. For this year, we have made a few alterations to the PPEC structure to better meet accounting and tracking needs:

- MIOSM activities are being accounted for in different PPECs (primarily in Advocacy, Professional Development, and in Give a Note Foundation)
- Awareness items, other than those for Tri-M, are being accounted for under a single heading. Previously, these were handled in several different PPECs.
- Some of the definitions and titles of PPECs have been edited for clarity.

<table>
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<tr>
<th>PPEC</th>
<th>Strategic Relationship Development/Collaborations. Developing and reporting on collaborations between and among NAfME and other nonprofit entities in fulfillment of a PPEC. Management of those collaborations will reside with the appropriate PPEC.</th>
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| Net Financials | FY 2014/2015 budget: ($2,950)  
FY 2014/2015 – 03/31/2015: ($29,231)  
FY 2015/2016 budget: ($9,250) |
| Activities | • Invitations and contact with leaders  
• CEF event participation and strategic planning  
• Hosting of meals, receptions  
• Design and production of promotional materials |
| Metrics | Lag: Collaborative ventures connected to PPECs will engage at least 12,000 individuals and result in income of $7500.  
**Lead 1:** Develop at least one collaborative venture that adds value to NAfME membership by increasing engagement with an interest group (Jazz, Choral, Research....) and generating revenue.  
**Lead 2:** Develop a minimum of two collaborations that are designed to add measurably to engagement of constituency groups, involve in-kind services/products to defer costs, and are able to be marketed as a member benefit. |
| Analysis and Planning | Tactics will include extend invitations to organizational leaders to attend 1) Some aspect of NLA – Hill Day 2) our National Conference 3) ANHE concert 4) Research conference 5) Possibly USAAAMB. |

Table 3. Summary budget, outcomes, and key metrics for Strategic Relationship Development/Policy Collaborations
### Strategic Relationship Development/Corporate Relationships

Developing and reporting on collaborations between and among NAfME and corporate members or other corporate constituents, including corporate memberships and other relationships, including sponsorships. Revenue for sponsorships will normally accrue to the appropriate PPEC.

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<td>FY 2014/2015 – 03/31/2015</td>
<td><strong>$30,578</strong></td>
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**Activities**

- Soliciting and fulfilling Corporate Membership
- Developing marketing materials for sponsorships of NAfME programs
- Managing contractual relationships
- Positioning NAfME as a marketing partner or collaborative partner for programs that advance association mission and goals.

**Metrics**

- **Lag (culminating):** Increase corporate membership to 120 members and increase corporate engagement in sponsorship for a total revenue enhancement of $11,500.
- **Lead (enabling):** enhance engagement opportunities (sponsorship) aligned with NAfME programmatic areas.
- **Lead (enabling):** Institute a lower price point category aimed at small businesses.
- **Lead (enabling):** Promote corporate engagement/support/sponsorship of at least two PPEC initiatives outside of the conference.

**Analysis and Planning**

New tactics will include comprehensive ‘leave behind’ that outlines all NAfME PPECs as opportunities to connect with a core market. Increase value proposition of membership through enhanced benefit offerings, exposure, and services. Will create a much needed “Leave behind” piece in hard copy and digital formats. Anticipate that revenue increases will be larger in subsequent years. Some revenue will appear in sponsorship of specific PPECs (Conference, Tri-M, etc).

### Summary Budget, Outcomes, and Key Metrics for Strategic Relationship Development/Corporate Relationships

<table>
<thead>
<tr>
<th>PPEC</th>
<th>Strategic Relationship Development/Corporate Relationships</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Advocacy orientation both in-person and distance learning, for governance members and outside audiences, advocacy strategic planning and campaign execution, and crisis management. Includes MIOSM and activities where specifically tied to advocacy. Admin support and all related activities for MEPR.</td>
</tr>
</tbody>
</table>

<table>
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<tr>
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</thead>
<tbody>
<tr>
<td>FY 2014/2015 – 03/31/2015</td>
<td><strong>($5,021)</strong></td>
<td></td>
</tr>
</tbody>
</table>

**Activities**

- Roundtable solicitation
- Roundtable strategic planning
- ESEA petition support activities

**Metrics**

- **Lag (culminating):** Grow Roundtable to 40 participating organizations by June, 2016, with 20+ having made financial contributions by December 31, 2015.
- **Lead (enabling):** Add 2 Roundtable “Supporters” by August, 2015.
- **Lead (enabling):** Conduct Roundtable PR-style campaigning designed to spur growth in at least two conference settings prior to December 31, 2015.
- **Lead (enabling):** Coordinate or continue to facilitate task force and/or strategic planning advocacy activities with two-thirds of state MEAs by May of 2016.

**Analysis and Planning**

State capacity for advocacy is increasing exponentially. The need for cross-pollination and support will continue to increase as states gain knowledge and increase their need for more sophisticated advocacy tools and support.

### Summary Budget, Outcomes, and Key Metrics for Capacity Building/Advocacy

<table>
<thead>
<tr>
<th>PPEC</th>
<th>Capacity Building/Advocacy</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Advocacy orientation both in-person and distance learning, for governance members and outside audiences, advocacy strategic planning and campaign execution, and crisis management. Includes MIOSM and activities where specifically tied to advocacy. Admin support and all related activities for MEPR.</td>
</tr>
</tbody>
</table>

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<thead>
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</thead>
<tbody>
<tr>
<td>FY 2014/2015 – 03/31/2015</td>
<td><strong>$30,578</strong></td>
<td></td>
</tr>
</tbody>
</table>

**Activities**

- Roundtable solicitation
- Roundtable strategic planning
- ESEA petition support activities

**Metrics**

- **Lag (culminating):** Grow Roundtable to 40 participating organizations by June, 2016, with 20+ having made financial contributions by December 31, 2015.
- **Lead (enabling):** Add 2 Roundtable “Supporters” by August, 2015.
- **Lead (enabling):** Conduct Roundtable PR-style campaigning designed to spur growth in at least two conference settings prior to December 31, 2015.
- **Lead (enabling):** Coordinate or continue to facilitate task force and/or strategic planning advocacy activities with two-thirds of state MEAs by May of 2016.

**Analysis and Planning**

State capacity for advocacy is increasing exponentially. The need for cross-pollination and support will continue to increase as states gain knowledge and increase their need for more sophisticated advocacy tools and support.
<table>
<thead>
<tr>
<th>PPEC</th>
<th><strong>Capacity Building/Federated Organizations.</strong> Efforts to build organizational capacity in the NAfME family of State Federated Associations.</th>
</tr>
</thead>
</table>
| Net Financials | FY 2014/2015 budget: ($3,700)  
FY 2014/2015 – 03/31/2015: ($2,921)  
FY 2015/2016 budget: ($34,500) |
| Activities | • Coordinated efforts to develop and enhance state advocacy days in a variety of states across the country  
• Coordinated efforts to promote non-advocacy day activities in states in the form of coalition building, sponsored legislation, grassroots member engagement, advocacy branding, and direct state lobbying efforts  
• Coordinated efforts to build and develop advocacy capacity through the Advocacy Leadership Force |
| Metrics | **Lag (culminating):** Verify evidence of quantifiable advocacy capacity building taking root in two-thirds of state MEAs by June of 2016.  
**Lead (enabling):** Achieve verification of planned or ongoing state advocacy days being coordinated and executed by one-half of state MEAs by May of 2016.  
**Lead (enabling):** Procure evidence of at least one (non-state advocacy day) state MEA coordinated advocacy activity completed or underway in one-half of states by March of 2016.  
**Lead (enabling):** Coordinate or continue to facilitate task force and/or strategic planning advocacy activities with two-thirds of state MEAs by May of 2016. |
| Analysis and Planning | State capacity for advocacy is increasing exponentially. The need for cross-pollination and support will continue to increase as states gain knowledge and increase their need for more sophisticated advocacy tools and support. With potential passage of ESEA reauthorization (and/or federal administration realignment) may have additional opportunities at state level. Also includes activities in general capacity building at state level on part of Executive Director and others. |

Table 6: Summary budget, outcomes, and key metrics for /Capacity Building/Federated Organizations

<table>
<thead>
<tr>
<th>PPEC</th>
<th><strong>Capacity Building/Resource Centers.</strong> Efforts to provide a presence at the conferences or exhibitions of State Federated Associations and entities outside the NAfME family of organizations.</th>
</tr>
</thead>
</table>
| Net Financials | FY 2014/2015 budget: ($27,500)  
FY 2014/2015 – 03/31/2015: ($48,337)  
FY 2015/2016 budget: ($34,000) |
| Activities | • Select and plan Resource Centers to leverage survey data  
• Promote initiatives accordingly.  
• Design, produce, distribute acquisition vehicles, incentives, giveaways  
• Promote advocacy and NAfME programs to outside organizations – BOA and DCI Finals (Tri-M and Student Programs); NASSP (possible sponsor of activity rather than attend); NASMD (for corporate membership). |
| Metrics | **Lag (culminating):** Convert at least 20% of leads generated for each program to increased participation in NAfME programs, for total converted leads of 180  
**Lead (enabling):** Acquire average of 50 leads for targeted NAfME programs at resource centers.  
**Lead (enabling):** Hold 18 resource centers at states  
**Lead (enabling):** Hold 4 resource centers at non-MEA meetings or events |
| Analysis and Planning | Expecting limited revenue from resource shops, more generation of activity for other PPECs. |
Table 7: Summary budget, outcomes, and key metrics for Capacity Building/Resource Centers

<table>
<thead>
<tr>
<th>PPEC</th>
<th><strong>Capacity Building/Societies &amp; Councils.</strong> For activities related to the capacity building of the Societies and Councils to meet the Association mission and goals through PPECs, including management and execution of contests and competitions or other projects assigned to Societies or Councils.</th>
</tr>
</thead>
</table>
| **Net Financials** | FY 2014/2015 budget: **($1,600)**  
FY 2014/2015 – 03/31/2015: **$2**  
FY 2015/2016 budget: **$875** |
| **Activities** | Maintain regular contact with Chairs and Board Liaisons  
Trouble-shooting and resolution  
Tracking and facilitation of council projects (e.g., contests) |
| **Metrics** | Lag (culminating): 100 percent of Societies and Councils have completed their 2014-16 Presidential charges by fiscal year end 2016.  
Lead (enabling): Provide staff guidance or assistance with facilitation to Societies and Councils in the execution a Presidential Charge where possible.  
Lead (enabling): Maintain regular (quarterly at least) contact with emphasis on delivery of Presidential Charges |
| **Analysis and Planning** | Steady allocation |

Table 8: Summary budget, outcomes, and key metrics for Capacity Building/Societies & Councils

<table>
<thead>
<tr>
<th>PPEC</th>
<th><strong>Capacity Building/National Assembly.</strong> Management, planning, and expenses connected with the National Assembly (NASS), including support for NASS delegates at annual meeting as an Assembly delegate (presidents of State Federated Associations (or their appropriate designees), for Council/Society Chairs, and for Division Officers only when serving as members of the National Assembly.</th>
</tr>
</thead>
</table>
| **Activities** | Booking space and F/B  
Technology/logistical support  
Registration and communication  
Scripting, content preparation |
| **Metrics** | Lag: Document action by at least 60 percent of Assembly delegates on activities discussed at the Assembly.  
Lead: Work with others on content and implementation with the target of achieving a 90 percent satisfied or highly satisfied rate in post-event surveys of Assembly delegates.  
Lead: Achieve representation for at least 46 states and 14 Societies/Councils at the Assembly. |
| **Analysis and Planning** | Steady state |

Table 9: Summary budget, outcomes, and key metrics for Capacity Building/National Assembly
### Professional Development

Management of and content production for professional development for members and other constituents through online or face-to-face venues other than conferences. Includes MIOSM and PD for other calendar-specific teaching opportunities.

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<tbody>
<tr>
<td>FY 2014/2015 – 03/31/2015: $14,037</td>
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<td></td>
</tr>
</tbody>
</table>

**Activities**
- Development and production of webinars
- Development of PD materials
- Marketing of PD activities
- Billing and accounting for PD

**Metrics**
- Lag (culminating): Provide 7 multisession blended learning opportunities, with 10% of each target constituency involved.
- Lead (enabling): Create a webinar series “Translating Research into Action” that highlights important and relevant research that impacts classroom instruction.
- Lead (enabling): Integrate online PD with conference by creating corresponding session tracks at 2016 In-Service conference related to webinar series.
- Lead (enabling): Integrate online PD with Solutions Music Group and other PPECs by intentionally including links to or mentions of other association activities.

**Analysis and Planning**
Expect to generate about $25,000 (priced at $159) for the series of 10 webinars in each area – estimating 80 people purchase each series. Individual webinars sales should contribute $1600.

Table 10: Summary budget, outcomes, and key metrics for Professional Development

### Member & Student Experiences/Biennial Conference

Management, planning, and oversight of Biennial Research and Teacher Education National Conference. Includes activities for choosing and presenting content.

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<tr>
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</thead>
<tbody>
<tr>
<td>FY 2014/2015 – 03/31/2015: $273</td>
<td></td>
<td></td>
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</tbody>
</table>

**Activities**
- Working with PDC to resolve issues in planning and execution
- Proposal Intake Process
- Scheduling presentation and poster sessions
- Website (includes the archiving of poster session content)
- Marketing and promotion
- Oversight of Print and digital program
- Staffing

**Metrics**
- Lag (culminating): Conference attracts at least 620 attendees to make projected budget
- Lead (enabling): Have in place the infrastructure to meet the schedule established by staff and the PDC
- Lead (enabling): Secure sufficient presentation and poster sessions to attract the necessary attendees for projected budget

**Analysis and Planning**
Expect limited increase in attendance with heavy staff activity in preparation and execution of conference

Table 11: Summary budget, outcomes, and key metrics for Member & Student Experiences/Biennial Conference
<table>
<thead>
<tr>
<th><strong>PPEC</strong></th>
<th><strong>Member &amp; Student Experiences/In-Service Conference.</strong> Management, planning, and oversight of annual In-Service conference. Includes activities for choosing and presenting content.</th>
</tr>
</thead>
</table>
| **Net Financials** | **FY 2014/2015 budget: $173,240**  
**FY 2014/2015 – 03/31/2015: ($27,301)**  
**FY 2015/2016 budget: ($26,300)** |
| **Activities** | • Coordination and approval of decorating/layout  
• Marketing and promotion  
• Selection/scheduling of sessions  
• Coordination of exhibits and sponsorships  
• Production of materials  
• Shipping, travel |
| **Metrics** | Lag: Draw 1,500 (1,700 for 2016) attendees and sufficient sponsorships to have a positive cash flow.  
Lead 1: Deploy an integrated multi-channel marketing strategy that reaches each member a minimum of 4 times.  
Lead 2: Expand support of corporate members beyond exhibiting to include sponsorship of events and sessions.  
Lead 3: Present sufficiently compelling and desirable professional development and associated activities to build attendance. |
| **Analysis and Planning** | **In 2016, will add:**  
Lead 1: Deploy an integrated multi-channel marketing strategy to highlight the move to Texas and engage 3% of TMEA members.  
Lead 2: Create new conference activities (student festival, student leadership) or enhance existing (pre-conference) to draw new attendees (student groups).  
Lead 3: actively seek cooperation with other entities (e.g., Urban Music Leadership Conference) to mount pre-conferences or other related activities.  
**Expenses:** Marketing/production/printing $35,000  
**Revenue:** Advance exhibit sales/sponsorships - $10,000 |

Table 12: Summary budget, outcomes, and key metrics for Member & Student Experiences/In-Service Conference
**PPEC**

**Member & Student Experiences/Performance Experiences.** Management, planning, and oversight of performance experiences for students or other constituents, including All National Honors Ensembles, US Army All-American Marching Band, other similar experiences.

<table>
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<tr>
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<tbody>
<tr>
<td>FY 2014/2015 – 03/31/2015: <strong>$19,368</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Activities**

- Marketing and promoting programs to states and directors
- Securing conductors and executing contracts
- Recruiting volunteers
- Soliciting donations of equipment
- Managing application process and selection of students

**Metrics**

- **Lag (culminating):** Expand gross number of participants of all types by 10%.
- **Lead (enabling):** Carry out leads for honors
- **Lead (enabling):** Carry out leads for USAAMB
- **Lead (enabling):** Carry out leads for Concert for MIOSM

**2015 Honors:**

- **Lag:** Expand revenue for program through parent engagement programs and student spirit items and related activities.
- **Lead 1:** Deploy marketing and communication materials directed toward parent engagement at the conference.
- **Lead 2:** Launch NAfME Student Fellows program for approximately 100 students

**2016 Honors:**

- **Lag:** Expand program marketing to garner a greater percentage of applications from eligible students and to off-set costs through sponsor support.
- **Lead 1:** Provide program outline and materials to states during National Assembly and prior to start of 15-16 school year.
- **Lead 2:** Develop and deploy marketing tactics to engage additional corporate and university sponsors.

**2016 USAAMB**

- **Lag:** Increase involvement and engagement of HS Marching Band directors by 10% over last year–measured by nominations, increased applications, and new memberships.
- **Lead:** Convert non-member HS directors of selected students to become members through targeted communications throughout the year.
- **Lead:** Build reputation and brand in marching band community by engaging instructional staff in PD activities pre and post USAAAMB – potentially at In-Service and through e-learning.

**WLC:**

- **Lag:** Create an interactive, virtual music event that engages 20% of overall membership.
- **Lead 1:** Secure lesson plans and music offerings by National Assembly.
- **Lead 2:** Work with sponsor to add a melody writing competition to the WLC.

**Analysis and Planning**

- **Expenses:** Additional transportation expense to shuttle students to off-site experiences. Potentially some clinician expenses.

Table 13: Summary budget, outcomes, and key metrics for Member & Student Experiences/Performance Experiences
### Member & Student Experiences/Tri-M

The NAfME honor society for secondary school students.

#### Net Financials

<table>
<thead>
<tr>
<th>Year</th>
<th>Budget</th>
<th>FY 2014/2015 – 03/31/2015:</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY 2014/2015</td>
<td>$544,555</td>
<td>$156,667</td>
</tr>
<tr>
<td>FY 2015/2016</td>
<td>$539,150</td>
<td></td>
</tr>
</tbody>
</table>

#### Activities

- New and renewing chapter certificates
- Lapsed member communications
- Back to school information
- Education programs/webinars for advisors and students
- Promotion of graduation regalia

#### Metrics

Lag: Establish or maintain Tri-M chapters in 10% of nation’s secondary schools (approximately 2,500 chapters).

Lead 1: Using Gelia survey data, target affluent school districts across the US for Tri-M chapter activation, tracking Lag market penetration in each state.

Lead 2: Develop three national service projects (Give a Note, Advocacy, and Music Mentoring)

#### Analysis and Planning

Looking for significant growth; will require additional work at identifying and communicating with teachers in those schools.

---

### Member & Student Experiences/Hill Day

Signature national advocacy event, featuring orientation sessions, Capitol Hill visits and associated advocacy and public policy activities for governance, Collegiate members and select outside audiences, in efforts to benefit the field of music education.

#### Net Financials

<table>
<thead>
<tr>
<th>Year</th>
<th>Budget</th>
<th>FY 2014/2015 – 03/31/2015:</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY 2014/2015</td>
<td>($49,800)</td>
<td>($3,674)</td>
</tr>
<tr>
<td>FY 2015/2016</td>
<td>($43,975)</td>
<td></td>
</tr>
</tbody>
</table>

#### Activities

- Develop 2015 legislative asks and secure sign-off by Roundtable partners
- Coordination and facilitation of all Hill Day events, including schedule tracking, preparation of meeting materials, morning reception at Nelson Mullins, and communications to state leadership to prepare them for the event
- Secure VIP guests for Hill Day
- Promotion by all primary teams of Collegiate Advocacy Summit to secure registrations
- Preparation and execution of Collegiate Advocacy Summit leadership training and Hill Day experience

#### Metrics

Lag (culminating): Achieve evidence of increased engagement and capacity by at least 80 percent of state MEAs and collegiate attendees, as evidenced by Hill Day post-action survey.

Lead (enabling): Implement five tactics via marcomm, BD, membership, advocacy, and state leadership communications by December 31, 2015, (targeting yield of 45 states).

Lead (enabling): Implement 15 tactics via marcomm, BD, membership, advocacy, and state leadership communications to promote the Collegiate Advocacy Summit by March 31, 2016, (targeting yield of 100 collegiate attendees).

#### Analysis and Planning

Table 14: Summary budget, outcomes, and key metrics for Member & Student Experiences/Tri-M

Table 15: Summary budget, outcomes, and key metrics for Member & Student Experiences/Hill Day
### Member & Student Experiences/Awards, Honors, & Recognition

Development and administration of all member or constituent awards, honors, & recognition where not the subject of a contest under the aegis of a Society or Council.

<table>
<thead>
<tr>
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<tr>
<td></td>
<td>FY 2014/2015 – 03/31/2015: ($173)</td>
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</tbody>
</table>

- Tracking
- Working with relevant committees on adjudication
- Purchasing awards

**Metrics**

- **Lag (culminating):** Document at least 50 individual cases of increased WIG-based activity (e.g., donations from award notifications, acts of significant engagement).
- **Lead (enabling):** Publicize all awards in this PPEC, achieving net minimum impressions (e.g., opens of dedicated emails, click-throughs to stories) of 5,000.
- **Lead (enabling):** Identify awardees for at least ten awards in fiscal year, possibly including NAfME Advocacy award, Lowell Mason fellows, awards connected with student ensembles, awards connected with member campaigning.

**Analysis and Planning**

- Steady state

<table>
<thead>
<tr>
<th>PPEC</th>
<th>Public Policy/Standards &amp; Evaluation. Development of National Standards for Arts Education, music education evaluation protocols and resources, and professional development services. Distribution of services is normally through Professional Development, conference, or Consultancy.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net Financials</td>
<td>FY 2014/2015 budget: <strong>$11,000</strong></td>
</tr>
<tr>
<td></td>
<td>FY 2014/2015 – 03/31/2015: ($26,237)</td>
</tr>
</tbody>
</table>

- Ongoing work with NCCAS
- Implementation of product
- Update of Teacher Evaluation workbooks
- Development and dissemination of messaging on standards implementation
- Coordination of outreach activities
- Development and release of online lessons keyed to new standards

**Metrics**

- **Lag (culminating):** Achieve adoption/adaptation of National Core Music Standards in 15 states
- **Lead (enabling):** Work with key contacts across 20 states to adopt the National Core Music Standards totally or in appropriately modified forms.
- **Lead (enabling):** Provide professional development focused on the National Core Music Standards with participation from at least 30 states.

**Analysis and Planning**

- Increase awareness of the National Core Arts Standards and work toward implementation with states.

---

Table 16: Summary budget, outcomes, and key metrics for Member & Student Experiences/Awards, Honors, & Recognition.

Table 17: Summary budget, outcomes, and key metrics for Public Policy/Standards & Evaluation.
### Public Policy/Lobbying

Federal (direct) lobbying on behalf of the music education cause, as defined by law; Federal (grassroots) lobbying on behalf of the music education cause, as defined by law; State (direct) lobbying on behalf of the music education cause, as defined by law; State (grassroots) lobbying on behalf of the music education cause, as defined by law.

<table>
<thead>
<tr>
<th>Net Financials</th>
<th>FY 2014/2015 budget: $(2,500)</th>
<th>FY 2015/2016 budget: $(1,275)</th>
</tr>
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<tbody>
<tr>
<td></td>
<td>FY 2014/2015 – 03/31/2015: $(1,780)</td>
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</tbody>
</table>

### Activities
- Collaboration with NAMM on refining of key legislative language for select offices
- Regular visits/phone calls/correspondence to key Committee members offices in support of current ESEA agenda
- Drafting of “core subject” coalition letter

### Metrics
**Lag (culminating):** Between July 2015 and July 2016, ensure that NAfME contributes substantively on behalf of keeping music in schools and furthering music education, to the development of ESEA, the Higher Education Act, and all other appropriate legislative and regulatory measures by actively participating in at least 80% of relevant developments.

**Lead (enabling):** Between July 2015 and July 2016, provide monthly updates to all appropriate audiences (including Roundtable, ALF, higher ed., Arts Education Working Group, CEF, NAMM, etc.) on all pertinent legislative and regulatory developments

**Lead (enabling):** Engage Higher Education Policy Task Force in 2 engagements designed to highlight research benefits of offering music in schools/music education, for purposes of bolstering music’s place in ESEA/Higher Education Act during appropriate periods of action prior to July 2016.

### Analysis and Planning
Key strategy is to ensure designation of “music” as a core academic subject in the final Senate legislative language of the 2015 ESEA reauthorization push (expected culmination of efforts: June, 2015). Will need to develop collaborative policy briefing(s), thus engaging multiple strategic partners.

---

### Public Policy/Research

Support for policy research/analysis and educational advocacy material creation benefiting the field of music education.

<table>
<thead>
<tr>
<th>Net Financials</th>
<th>FY 2014/2015 budget: $(4,430)</th>
<th>FY 2015/2016 budget: $15,925</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>FY 2014/2015 – 03/31/2015: $(7,719)</td>
<td></td>
</tr>
</tbody>
</table>

### Activities
- Maintain updates to policy researchers
- Maintain NAfME/SRME research grant
- Work on approval of policy research definition

### Metrics
**Lag (culminating):** Involve Policy Research Community (including, but not limited to, both Societies) in three policy initiatives buttressed by the development of and or reliance upon key research studies by June of 2016.

**Lead (enabling):** Carry out and document at least one contact weekly with an individual or group within the research community on policy issues.

**Lead (enabling):** Dissemination to general membership of at least one policy-related research result per month.

**Lead (enabling):** Disseminate updated Policy Research Agenda by July of 2015.

**Lead (enabling):** Engage 5 key researchers involved with prominent areas of policy research beneficial to the field of music education by December of 2015.

### Analysis and Planning
Potential for increase of activity, depending on receptiveness of research community.

---

Table 18: Summary budget, outcomes, and key metrics for Public Policy/Lobbying

Table 19: Summary budget, outcomes, and key metrics for Public Policy/Research
### PPEC Brand Management/Marketing Communications

*External:* Development and execution of all marketing and public relations campaigns or efforts connected with all NAfME PPECs. Note that direct expenses for marketing individual PPECs will be tracked within those PPECs when possible. *Internal:* Development and execution of all communications to internal constituencies related to specific marketing or PR campaigns or efforts for PPECs. Includes Recital, OS News.

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<tbody>
<tr>
<td></td>
<td>FY 2014/2015 – 03/31/2015: $(49,034)</td>
<td></td>
</tr>
</tbody>
</table>

### Activities
- Creating coordinated strategy and tactics across NAfME PPECs
- Development of marketing materials including direct mail, e-mail, trade show booths
- Creating, soliciting, promoting and communicating content through various channels
- Public relations outreach
- Website updates & Blogs

### Metrics

**Lag (culminating):** Present NAfME as unified brand of programs and initiatives, with uniform look and feel and no more than 10% of all outside communications straying as outside of branding strategy.

**Lead (enabling):** Create integrated marketing materials that define the NAfME brand and mission.

**Lead (enabling):** Using Gelia survey data, target key constituencies for marketing and growth and develop hard copy, video, and other digital media.

### Analysis and Planning
Additional efforts under targeted PPECs; need to provide close oversight to produce uniform, and hence more effective, brand strategy.

---

### PPEC Brand Management/Digital Media

*Social Media:* Efforts to produce, promote, and disseminate messages through social media to increase effectiveness of PPECs. *Web:* Development, posting, and monitoring of content on the association web site(s) with the goals of (1) supporting PPECs and (2) providing an archive of association content; Advertising on the NAfME web site; Advertising on the NAfME web site.

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<tbody>
<tr>
<td></td>
<td>FY 2014/2015 – 03/31/2015: $12,733</td>
<td></td>
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</tbody>
</table>

### Activities
- Management of NAfME social media
- Developing relationships with social media influencers
- Video shooting and editing
- Web updates
- Blogging

### Metrics

**Lag:** Leverage social media to promote NAfME brand and to increase reach to new audiences.

**Lead:** Increase social media engagement through guest blogs, repurposed professional development content, and advocacy initiatives.

**Lead:** Maintain one-day turnaround time for key issues.

### Analysis and Planning
Increased activity.

---

Table 2: Summary budget, outcomes, and key metrics for Brand Management/Marketing Communications

Table 21: Summary budget, outcomes, and key metrics for Constituency Services/Societies & Councils
<table>
<thead>
<tr>
<th><strong>PPEC</strong></th>
<th><strong>Membership Growth &amp; Development/Campaigns.</strong> Development and administration of planned campaigns to build full-active membership, generally in targeted segments (geographic, professional, attitudinal).</th>
</tr>
</thead>
</table>
| **Net Financials** | **FY 2014/2015 budget:** (**$208,550**)  
**FY 2014/2015 – 03/31/2015:** (**$65,608**)  
**FY 2015/2016 budget:** (**$133,200**) |
| **Activities** | • Develop campaign copy  
• Design & Print virtual/hard copy materials  
• Purchase, manage mailing lists  
• State Planning meetings and virtual training  
• Onboarding communications, retention communications  
• Social network/phone/online ad/email promotion |
| **Metrics** | **Lag (culminating):** Return membership to 70,200 (est. annual gain of +3%) by June 30, 2016 through series of member / non-member engagements (combination of Active, Retired, Associate and Collegiate members).  
**Lead (enabling):** Launch 5 full-service campaigns by October 31, 2015 and 8 “limited-service” campaigns by April 30, 2016 (Active member/retention campaigns).  
**Lead (enabling):** Complete and report results from 13 campaigns by June 30, 2016 (recruitment/retention campaigns). |
| **Analysis and Planning** | Increased effort in this area from other staff members, while also simplifying operations and national-to-state messaging. |

**Table 22: Summary budget, outcomes, and key metrics for Membership Growth & Development/Campaigns**

<table>
<thead>
<tr>
<th><strong>PPEC</strong></th>
<th><strong>Membership Growth &amp; Development/Volunteer/Leadership Development.</strong> Management, planning, and oversight of capacity building of individuals or self-selected groups of volunteers, or volunteers within established NAfME structures, to help them become engaged in PPECs or general support for NAfME. Does not include organizational development of MEAs, Societies, or Councils.</th>
</tr>
</thead>
</table>
| **Net Financials** | **FY 2014/2015 budget:** (**$26,000**)  
**FY 2014/2015 – 03/31/2015:** (**$920**)  
**FY 2015/2016 budget:** (**$25,000**) |
| **Activities** | • Development/production of materials  
• Face-to-face and virtual “live” training sessions  
• Recruitment/onboarding/retention campaign and focus group development |
| **Metrics** | **Lag (culminating):** At least 50% of State Membership Chairs (or equivalent) trained in all aspects of member recruitment/retention program management by June 30, 2016.  
**Lead (enabling):** At least 15 states, reaching 100 individuals, confirmed as receiving guidance from NAfME or independently in membership recruitment/retention/onboarding and/or similar projects by June 30, 2016.  
**Lead (enabling):** At least 15 states confirmed as assigning, to an appropriate volunteer, job responsibilities contained in NAfME’s suggested Membership chair position description. |
| **Analysis and Planning** | Was a new line item in FY2014-2015. Additional work and increased interaction between CE Team members and State Presidents/Membership Chairs will be required, to engage their Boards and encourage reasonable planning during off peak periods of school activity (prior to September, 2015 and after March, 2016). The list of states involved in this activity may / may not include those states considered “full-service” campaign states. |

**Table 23: Summary budget, outcomes, and key metrics for Membership Growth & Development/Volunteer/Leadership Development**
<table>
<thead>
<tr>
<th>PPEC</th>
<th><strong>Membership Growth &amp; Development/Collegiate.</strong> Planning, development, and administration of campaigns to build Collegiate membership.</th>
</tr>
</thead>
</table>
| **Net Financials** | FY 2014/2015 budget: **$192,460**  
                          FY 2014/2015 – 03/31/2015: **$170,515**  
                          FY 2015/2016 budget: **$204,685** |
| **Activities** | • Design & Dissemination of materials  
                          • Consistent one-on-one outreach to chapter advisors  
                          • Engagement with Collegiate Advisory Council  
                          • Direct engagement with students  
                          • Development of new collegiate member benefits to attract new members |
| **Metrics** | **Lag (culminating):** Achieve three percent increase over 2015 membership numbers.  
                          **Lead (enabling):** Contact made with 90 percent of collegiate chapter chairs by December 15th, assuming incomplete roster/contact information.  
                          **Lead (enabling):** Implement three recruitment tactics (communications) per chapter, including to state collegiate chairs by March 30th. |
| **Analysis and Planning** | Considerable growth in this area. In 2015-2106, we expect to develop new methods of engagement with the collegiate membership and to offer exclusive professional benefits to drive recruitment and retention. |

Table 24: Summary budget, outcomes, and key metrics for Membership Growth & Development/Collegiate
<table>
<thead>
<tr>
<th>PPEC</th>
<th>Membership Growth &amp; Development/Associate: Planning, development, and administration of campaigns to build Associate membership.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activities</td>
<td>• Message development &amp; Vetting&lt;br&gt; • Working with outside entities for outreach as appropriate&lt;br&gt; • Design/printing/production of materials&lt;br&gt; • List purchases&lt;br&gt; • Social network implementation&lt;br&gt; • Member-get-a-member tactics, ongoing collection of names for additional promotion&lt;br&gt; • Meet with outside groups for planning and exploration</td>
</tr>
<tr>
<td>Metrics</td>
<td><strong>Lag (culminating):</strong> Realize 50% increase in Associate memberships, resulting in collection of $15,000.00 in revenue during months 13-24 of the program, while also realizing a profit from this new category (revenue vs. direct expenses).&lt;br&gt; <strong>Lead (enabling):</strong> Develop “seed lists”, hard copy and “virtual” materials, and Resource Center promotional activity and distribute materials to targeted groups no later than March 31, 2016.&lt;br&gt; <strong>Lead (enabling):</strong> Develop strategy and launch “member-get-a-member” portion of campaign by September 30, 2015.</td>
</tr>
<tr>
<td>Analysis and Planning</td>
<td>Year two of Associate member recruitment program. Significant engagement of members joined in year 1 through focus groups and related activity will help to identify options for future promotion. Parent/booster targets should be engaged in year two, along with other appropriate prospects. Current legislation suggests that Early Childhood educators will present a major opportunity. We will investigate contacts with NAEYC and others to discuss certifications and other constituency-building programs that could lead to expanded membership category in FY17.</td>
</tr>
</tbody>
</table>

Table 25: Summary budget, outcomes, and key metrics for Membership Growth & Development/Associate
<table>
<thead>
<tr>
<th>PPEC</th>
<th><strong>Organizing/Association Relations.</strong> Planning, development, and administration of activities to strengthen relations with other organizations by developing common projects or campaigns, up to and including formal structural relationships such as shared employees, administration, or resources, to achieve common goals.</th>
</tr>
</thead>
</table>
| **Net Financials** | FY 2014/2015 budget: **($4,000)**  
FY 2015/2016 budget: **($4,500)** |
| Activities | • Meetings (live and virtual) with other associations |
| Metrics | Lag (culminating): Engage with at least 5 other associations in joint projects that have net positive results for WIGs.  
**Lead (enabling):** Report for each NEB meeting on situation regarding office space/logistical work with other associations.  
**Lead (enabling):** Document discussions with other associations on at least 15 potential projects. |
| Analysis and Planning | Strong possibilities for including other associations including Urban Music Leadership Conference and Ti:ME in conference.  
We are in ongoing communications with SHAPE and NASSP/NAESP and others regarding shared space. |

Table 26: Summary budget, outcomes, and key metrics for Organizing/Association Relations

<table>
<thead>
<tr>
<th>PPEC</th>
<th><strong>Business Processes/Membership Processing.</strong> Intake and processing of memberships in all categories.</th>
</tr>
</thead>
</table>
| **Net Financials** | FY 2014/2015 budget: **$3,115,520**  
FY 2014/2015 – 03/31/2015: **$2,674,081**  
FY 2015/2016 budget: **$3,607,580** |
| Activities | • Ongoing collection of member satisfaction ratings  
• Transaction activity reporting, and management adjustments as needed to ensure timely service activities  
• Continual development and implementation of retention/upselling tactics |
| Metrics | Lag (culminating): Achieve 85% member retention rate for members with Paid Thru Dates between October 1 and December 31, 2015, as of March 31, 2016.  
**Lead (enabling):** Staff training and supervision such that member satisfaction rate, as measured through customer surveys, is 95% or higher as of December 31, 2015.  
**Lead (enabling):** Staff training such that phone inquiry transfer rate for new employees is 10% or less as of November 30, 2015.  
**Lead (enabling):** All phone/e-mail inquiries are answered within 48 hours as of December 31, 2015. |
| Analysis and Planning | Refinements on staffing training and assignments under way, with a view to improving effectiveness and efficiency of this operation. |

Table 27: Summary budget, outcomes, and key metrics for Business Processes/Membership Processing
<table>
<thead>
<tr>
<th>PPEC</th>
<th><strong>Publications/Juried.</strong> Publishing activities related to peer-reviewed journals and books but not Educational products. Covers MEJ, JRME, GMT, Update, Books</th>
</tr>
</thead>
</table>
|            | FY 2014/2015 budget: $494,990  
|            | FY 2014/2015 – 03/31/2015: $275,427  
|            | FY 2015/2016 budget: $412,600 |
| Net        | **Activities**  
| Financials | • Coordination of contracts  
|            | • Facilitation of jurying  
|            | • Facilitation of editing processes  
|            | • Oversight of transition to digital “only” delivery (MEJ) including implementation of increased media-rich content |
|            | **Metrics**  
|            | **Lag:** 50% of MEJ content (articles and departments) will have some multimedia content by last two issues of fiscal year  
|            | **Lead:** Work with external parties (Library of Congress) to arrange scheduling and delivery of multimedia content  
|            | **Lead:** Work with MEJ editorial committee to ensure media-rich content is incorporated |
| Analysis   | **Analysis and Planning**  
| and       | Increased activity towards virtual publication and delivery of multimedia content (MEJ); steady state for all other juried publications. |
| Planning   |                                                                                                                                       |

Table 28: Summary budget, outcomes, and key metrics for Publications/Juried

<table>
<thead>
<tr>
<th>PPEC</th>
<th><strong>Publications/Non-Juried.</strong> Activities related to Teaching Music, or development of content in other venues, with that content chosen to indirectly enhance success of PPECs</th>
</tr>
</thead>
</table>
|            | FY 2014/2015 budget: $371,710  
|            | FY 2014/2015 – 03/31/2015: $81,404  
|            | FY 2015/2016 budget: $371,935 |
| Net        | **Activities**  
| Financials | • Managing contract with vendor  
|            | • Setting editorial calendar  
|            | • Writing, editing stories/news  
|            | • Forwarding leads, both member and non-member related |
|            | **Metrics**  
|            | **Lag (culminating):** Have in place agreed-upon content listings, with metrics aligning content to NAfME programs, by three months before each cover date  
|            | **Lead (enabling):** Using surveys sent to a sample of members after each TM issue, at least 80 percent of respondents will reflect some knowledge of and/or appreciation of the NAfME programs targeted.  
|            | **Lead (enabling):** Work with publisher (In-Tune) and staff in aligning content to NAfME programs for each issue |
| Analysis   | **Analysis and Planning**  
| and       | Moderate increase in activity to implement the lead metrics. |
| Planning   |                                                                                                                                       |

Table 29: Summary budget, outcomes, and key metrics for IT Publications/Non-Juried
<table>
<thead>
<tr>
<th>PPEC</th>
<th>Governance/NEB</th>
<th>Activities</th>
<th>Metrics</th>
<th>Analysis and Planning</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>• Regular communication with NEB members</td>
<td><strong>Lag (culminating):</strong> Achieve reported activity on at least five items by each board member, for a total of 65 activities, by June 30, 2015.</td>
<td>Steady state</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Preparation of data/reports for NEB</td>
<td><strong>Lead (enabling):</strong> Document closure of each action required in board minutes on schedule explicitly or implicitly in board minutes (regarding closure of action by staff or by NEB members, as indicated).</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Meeting organization</td>
<td><strong>Lead (enabling):</strong> Produce and disseminate minutes within two weeks of each meeting.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Minutes &amp; Records</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Processing of reimbursements</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Net Financials**


**Activities**

| • Regular communication with NEB members |
| • Preparation of data/reports for NEB |
| • Meeting organization |
| • Minutes & Records |
| • Processing of reimbursements |

Table 30: Summary budget, outcomes, and key metrics for Governance/NEB

<table>
<thead>
<tr>
<th>PPEC</th>
<th>Governance/Divisions</th>
<th>Activities</th>
<th>Metrics</th>
<th>Analysis and Planning</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>• Communications</td>
<td><strong>Lag (culminating):</strong> Achieve compliance by at least 80 percent of states with common actions discussed at division meetings or virtually.</td>
<td>Steady state</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Processing of reimbursements</td>
<td><strong>Lead (enabling):</strong> Document discussion of all common agenda items within fiscal year.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td><strong>Lead (enabling):</strong> Achieve at least 80 percent attendance at division meetings within fiscal year.</td>
<td></td>
</tr>
</tbody>
</table>

**Net Financials**


Table 31: Summary budget, outcomes, and key metrics for Governance/Divisions
### PPEC Development/Awareness Merchandise

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Activities</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Metrics</strong></td>
<td>Lag (culminating): Create and distribute merchandise that aligns with NAfME programs and initiatives that generates revenue as specified in the budget.</td>
<td>Lead (enabling): Develop and create products that align with NAfME programs/initiatives. Lead (enabling): Develop a line of music advocacy products and market to constituencies in the general public and education field.</td>
</tr>
<tr>
<td><strong>Analysis and Planning</strong></td>
<td>This new line now consolidates all awareness items, except for Tri-M merchandise.</td>
<td></td>
</tr>
</tbody>
</table>

Table 32: Summary budget, outcomes, and key metrics for Development/Awareness Items

### PPEC Development/Grants

<table>
<thead>
<tr>
<th><strong>Net Financials</strong></th>
<th>FY 2014/2015 budget: $-0-</th>
<th>FY 2015/2016 budget: $-0-</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Activities</strong></td>
<td>Investigate grant opportunities</td>
<td>Apply for and track grants</td>
</tr>
<tr>
<td><strong>Metrics</strong></td>
<td>Lag (culminating): Secure $25,000 in grant funding to support NAfME</td>
<td>Lead (enabling): Create a list of 25 grant prospects with key contacts and calendar of deadlines and requirements. Lead (enabling): Complete 4 grant applications for funding.</td>
</tr>
<tr>
<td><strong>Analysis and Planning</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Table 33: Summary budget, outcomes, and key metrics for Development/Grants

### PPEC Development/Fundraising

<table>
<thead>
<tr>
<th><strong>Net Financials</strong></th>
<th>FY 2014/2015 budget: $24,125</th>
<th>FY 2015/2016 budget: $24,800</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Activities</strong></td>
<td>Program-based fundraising</td>
<td>CFC</td>
</tr>
<tr>
<td><strong>Metrics</strong></td>
<td>Lag: Build NAfME fundraising program to include donations of $30,000, with $40,000 in CFC, for a total of $70,000. Lead 1: Develop and execute one crowd funding campaign to support one NAfME program/initiative.</td>
<td>Lead 1: Ensure that NAfME programs meet requirements for CFC eligibility.</td>
</tr>
<tr>
<td><strong>Analysis and Planning</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Table 34: Summary budget, outcomes, and key metrics for Development/Fundraising
**PPEC**  | **Give a Note Foundation.** Activities related to administrative or other support of Give a Note Foundation, consistent with agreement between NAfME and GNF.
---|---

**Net Financials**  | FY 2014/2015 budget: **$35,000**  
FY 2015/2016 budget: **($45,000)**

**Activities**  | • Fundraising events  
• Promoting activities and accomplishments  
• MIOS Tour  
• Creating culture of giving with NAfME members

**Metrics**  | Lag: Give a Note Foundation will raise enough funds to cover 50% of Foundation overall expenses.  
Lead 1: NAfME staff will support GNF board in filling all board positions and securing board financial commitments.

**Analysis and Planning**

| Table 35: Summary budget, outcomes, and key metrics for Give a Note Foundation |

---|---

**PPEC**  | **Solutions Music Group.** Activities related to administrative or other support of Solutions Music Group LLC (SMG). Providing assistance to clients with regard to implementation of issues on which NAfME offers guidance.
---|---

**Net Financials**  | FY 2014/2015 budget: **$35,000**  
FY 2014/2015 – 03/31/2015: **$21,477**  
FY 2015/2016 budget: **$16,750**

**Activities**  | • Marketing  
• Management of client contracts  
• Management of adviser contracts  
• Collection/editing/production of materials  
• Billing, evaluation, and analysis of contacts

**Metrics**  | Lag: Achieve at least 40 total engagements (consultancies and trainings) booked and completed  
Lead: Provide uniform, guiding materials to experts in All In and Standards areas, and at least one additional area.  
Lead: Maintain list of at least 12 experts in relevant areas.

**Analysis and Planning**  | Growth expected

<p>| Table 36: Summary budget, outcomes, and key metrics for Solutions Music Group Consultancy |</p>
<table>
<thead>
<tr>
<th>PPEC</th>
<th><strong>Internal Systems/IT.</strong> For hardware and software for support of the association and tenants and MEA’s. Also center for income from IT tenant &amp; MEA support income.</th>
</tr>
</thead>
</table>
| **Net Financials** | FY 2014/2015 budget: **$550**  
FY 2014/2015 – 03/31/2015: **$5,558**  
FY 2015/2016 budget: **$7,700** |
| Activities | • Programming for Headquarters  
• Programming for MEA processes  
• Technical support and training for users |
| Metrics | **Lag (culminating):** Implement state-level CRM access for eight new states by end of fiscal year, with costs for customization paid by states.  
**Lead (enabling):** Maintain troubleshooting processes resulting in solution (or at a minimum explanation) of any ticketed problem report within two working days.  
**Lead (enabling):** Complete at least five new program builds, as discussed in weekly punch meetings, by end of fiscal year. |
| Analysis and Planning | Steady state |

Table 37: Summary budget, outcomes, and key metrics for Internal Systems/IT

<table>
<thead>
<tr>
<th>PPEC</th>
<th><strong>Internal Systems/Facilities.</strong> For all transactions regarding maintenance of physical plant owned by the association. Also center for income from rental of facility.</th>
</tr>
</thead>
</table>
| **Net Financials** | FY 2014/2015 budget: **$109,190**  
FY 2014/2015 – 03/31/2015: **$88,880**  
FY 2015/2016 budget: **$29,480** |
| Activities | • Regular inspections of fire and water equipment  
• Daily NAfME mailings; NAfME membership mailings  
• NAEA mailings  
• Lawn maintenance; Snow and ice removal |
| Metrics | **Lag (culminating):** Maintain rental space at 75% occupancy.  
**Lead (enabling):** Support renters with all appropriate facility needs, addressing all concerns within two business days.  
**Lead (enabling):** Conduct regular inspections and equipment tests to ensure that staff and tenants have a save working environment with fully functioning facility, such that all legal inspections are passed and no working days are lost to non-weather equipment of facility mishaps. |
| Analysis and Planning | Steady state |

Table 38: Summary budget, outcomes, and key metrics for Internal Systems/Facilities
**Table 39: Summary budget, outcomes, and key metrics for Internal Systems/HR**

<table>
<thead>
<tr>
<th>PPEC</th>
<th>Internal Systems/HR. HR expenses, including consultants, payroll services, staff support for these activities.</th>
</tr>
</thead>
</table>
| Activities            | • Maintaining personnel records  
                          • Required reporting to federal, state, and local entities  
                          • Hiring and terminations oversight  
                          • Training of managerial staff on supervisory responsibilities |
| Metrics               | Lag (culminating): Maintain or increase productivity, measured by accomplishment of all PPEC outcomes within 3% staffing budget for each PPEC.  
                          Lead (enabling): Implement computer system for tracking team/individual goals as related to PPEC metrics.  
                          Lead (enabling): complete all hiring, onboarding, PA, and JDs on schedule. |
| Analysis and Planning | Steady state |

**Table 40: Summary budget, outcomes, and key metrics for Internal Systems/Finance**

<table>
<thead>
<tr>
<th>PPEC</th>
<th>Internal Systems/Finance. For tracking financials of the association, including preparation of budgets, reports and audits. Monitoring and reporting on investments.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Net Financials</strong></td>
<td>FY 2014/2015 budget: ($52,170) FY 2014/2015 – 03/31/2015: ($43,262) FY 2015/2016 budget: ($52,135)</td>
</tr>
</tbody>
</table>
| Activities            | • Data collection and reporting  
                          • Human Resources  
                          • Calendaring and scheduling  
                          • Policy and Procedures oversight  
                          • Coordination of all functional centers |
| Metrics               | Lag (culminating): Maintain financial planning and controls so that the annual budget stays within 1 percent variance (excluding planned variances approved by the Office of the Executive Director, and so that each PPEC stays within 3 percent unplanned variance.  
                          Lead (enabling): Maintain system so that any financial report requested by the Office of the Executive Director is available within two business days.  
                          Lead (enabling): Make certain that all financial data is entered into the CRM within two business days of receipt of that data. |
<p>| Analysis and Planning | Steady state |</p>
<table>
<thead>
<tr>
<th>PPEC</th>
<th><strong>Internal Systems/General Administration.</strong> For executive function, including general administration, supervision of association activities.</th>
</tr>
</thead>
</table>
FY 2014/2015 – 03/31/2015: **($50,278)**  
| Activities | • Oversight of all PPECs  
• Oversight of contracts, finances  
• Oversight of communication/coordination of all aspects of association business |
| Metrics    | **Lag (culminating):** Increase operational efficiency so that administrative overhead is reduced by at least 5 percent over the fiscal year.  
**Lead (enabling):** Address each identified operational issue and address those issues in writing within two weeks of identification of issue.  
**Lead (enabling):** Using information from EC meetings, EC+ meetings, and team chair meetings, identify in writing any operational issues on an ongoing basis. |
| Analysis and Planning | Steady state |

Table 41: Summary budget, outcomes, and key metrics for Internal Systems/General Administration
### III. Line-Item Detail

The NAfME budget can also be reported in terms of expenditures and income by line item, working across all PPECs by category of expenditure. Table 31 represents a summary of that reporting:

<table>
<thead>
<tr>
<th>Account Number</th>
<th>Account Description</th>
<th>Fiscal Year - 2015/2016 07/01/2015 thru 06/30/2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>40101</td>
<td>MEMBERSHIP DUES</td>
<td>$5,190,490</td>
</tr>
<tr>
<td>40201</td>
<td>PERIODICAL SUBSCRIPTIONS</td>
<td>323,600</td>
</tr>
<tr>
<td>40500</td>
<td>SALES</td>
<td>863,800</td>
</tr>
<tr>
<td>40502</td>
<td>SALES - POSTAGE (8% of sales)</td>
<td>22,255</td>
</tr>
<tr>
<td>40601</td>
<td>REGISTRATION</td>
<td>1,151,090</td>
</tr>
<tr>
<td>40615</td>
<td>EXHIBIT INCOME</td>
<td>3,500</td>
</tr>
<tr>
<td>40628</td>
<td>SPONSORSHIPS</td>
<td>143,000</td>
</tr>
<tr>
<td>40680</td>
<td>GRANTS &amp; CONTRACTS</td>
<td>100,000</td>
</tr>
<tr>
<td>40700</td>
<td>ADVERTISING</td>
<td>253,800</td>
</tr>
<tr>
<td>40740</td>
<td>ADVERTISING - IN-HOUSE NEWS</td>
<td>12,350</td>
</tr>
<tr>
<td>40801</td>
<td>INTEREST INCOME - GENERAL</td>
<td>500</td>
</tr>
<tr>
<td>41004</td>
<td>RENTAL INCOME - TENANT</td>
<td>31,055</td>
</tr>
<tr>
<td>41039</td>
<td>RENTAL INCOME - SPACE</td>
<td>1,500</td>
</tr>
<tr>
<td>41040</td>
<td>MANAGEMENT FEES</td>
<td>94,530</td>
</tr>
<tr>
<td>42100</td>
<td>ROYALTY INCOME - GENERAL</td>
<td>30,500</td>
</tr>
<tr>
<td>42120</td>
<td>ROYALTY INCOME - PERIODICALS</td>
<td>112,000</td>
</tr>
<tr>
<td>42130</td>
<td>ROYALTY INCOME - PUBLICATION SALES</td>
<td>13,000</td>
</tr>
<tr>
<td>45010</td>
<td>DONATIONS - GENERAL</td>
<td>37,840</td>
</tr>
<tr>
<td>46500</td>
<td>DISCOUNTS EARNED</td>
<td>5</td>
</tr>
</tbody>
</table>

**Total Revenue**

$8,185,115
<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>8000</td>
<td>OVERHEAD</td>
<td>$906,850</td>
</tr>
<tr>
<td>0900</td>
<td>SALARIES</td>
<td>2,024,290</td>
</tr>
<tr>
<td>7000</td>
<td>EMPLOYEE BENEFITS</td>
<td>620,680</td>
</tr>
<tr>
<td>5001</td>
<td>SPEAKERS, PERFORMERS / CHAIR EXPENSES</td>
<td>25,900</td>
</tr>
<tr>
<td>5003</td>
<td>SPACE RENTAL &amp; ASSOCIATED COSTS</td>
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<td>5008</td>
<td>EVENT LOGISTICS &amp; FUNCTIONS</td>
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<td>5020</td>
<td>PRODUCTION / PRINTING</td>
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<td>5023</td>
<td>COMMISSION FEES</td>
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<td>ROYALTY EXPENSE</td>
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<td>COST OF GOODS SOLD</td>
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<td>MEMBERSHIP RETENTION</td>
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<td>DUES &amp; SUBSCRIPTIONS TO PROFESSIONAL ASSOC</td>
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<td>LODGING &amp; MEALS</td>
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<td>6103</td>
<td>MEALS &amp; ENTERTAINING</td>
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<td>INTERNAL PROMOTION</td>
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<td>EXTERNAL PROMOTION</td>
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<td>6130</td>
<td>IN-HOUSE ADS - MEJ/SM</td>
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<td>IN-HOUSE NEWS SPACE - MEJ/SM</td>
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<td>IN-HOUSE WEB SITE DISPLAY ADS</td>
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<td>6210</td>
<td>PUBLICATIONS &amp; RESEARCH MATL</td>
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<td>POSTAGE &amp; MAILING &amp; UPS</td>
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<td>POSTAGE &amp; MAILING PROMOTION</td>
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<td>POSTAGE &amp; MAILING RETENTION</td>
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<td>TELECONFERENCING</td>
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<td>BAD DEBTS EXPENSE</td>
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<td>6270</td>
<td>FEDERAL TAX EXPENSE</td>
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<td>6280</td>
<td>VIRGINIA TAX EXPENSE</td>
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<td>AWARDS &amp; SCHOLARSHIPS</td>
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<td>6540</td>
<td>RECOGNITION</td>
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</table>

**Total Expenses**  
$3,159,840

**Net Income / (Shortfall)**  
$25,275
Investments and Reserves

- **Investment policy.** NAfME has three different types of funds: unrestricted (operating), temporary restricted (investment), and permanent restricted (scholarship). The moneys in each of these funds are invested according to NAfME’s formal investment policy, which was adopted in March, 2006. The operating funds are maintained in liquid accounts such as checking, savings, money markets and short term CDs. This is to maximize the ROI on NAfME’s liquid cash while keeping the moneys available for use. All investments are in FDIC insured institutions.

The investment funds are held in reserve in the case of unexpected capital requirements or other emergency situations which may arise in order to maintain the integrity of the association’s operations and service to its members. These funds are monitored by professional investors of Merrill Lynch. These individuals invest NAfME’s funds to provide the best possible ROI within the parameters set in the association’s investment policy.

The permanent restricted funds are two small scholarship funds. These funds are maintained in a combination of savings accounts and CD’s all covered by FDIC insurance. These funds can only be used according to the guides of the scholarship documentation.

The professional investors from Merrill Lynch meet with NAfME staff periodically to review the position of NAfME’s investments.

- **Equities and CDs.** The NAfME account balance at Market Value as of March 31, 2015 was $4,252,211. This is a 0.81% decrease from the market value at the beginning of the current fiscal year - June 30, 2014. Primarily as a result of taking funds from the investment reserves to cover operating expenses curing July and August 2014.

Operating Account Money Market Savings Accounts have a market value of $300,604 with a current yield of 0.2%.

- **Investments related to mission.** NAfME considers investments in mission-related activities where the costs of developing programmatic or technical capacity in-house would be prohibitive, and where the investment holds promise in terms of financial ROI.
  - NAfME has invested in Acceptd, an online application platform for students that is currently used by four states for All-State auditions, more than fifty universities for application and screening, and nearly a dozen festival/performance organizations such as Drum Corps International, Music for All, and Jazz at Lincoln Center.
  - NAfME has an additional investment in iSchool Music: a web-based management and communication tool for music teachers.
Restricted funds. The NAfME budget contains four restricted funds. There are two main categories of such funds:

- Funds for scholarships. These include the Harley Scholarship fund and the Kane Scholarship fund, in which expenditures are limited to the terms of the fund.
- Internal restricted funds:
  - The Advocacy and Efficiency Technology Fund. This was set up at the January 2011 meeting of the NEB to allow the Association to “replenish the reserve and act as a continuing funding source for technology upgrades.”
  - The Policy Research Fund. This became active this year.
IV. Analysis and Observations

- **Current Association Finances**: We are projecting a total net gain for the 2014-2015 year of $71,800.
- **Membership**: Membership numbers in the 2014-2015 year are up.
- **Reserves**: Current reserves stand at $4.270 Million. This represents 49% of last year’s total expenses.
- **Policy Research Fund**: This budget reflects a board-approved plan to increase our efforts in the least strong of our Strategic Directions: that of Research. The fund is currently building by setting aside:
  - $2,500 from reserves in FY14
  - $0.05 from each member’s dues, starting in FY15
  - 10 percent of revenue over expenses from the Biennial Research and Music Teacher Education Conference, each biennium

- **Give A Note Foundation and Solutions Music Group, LLC**: Both these entities are structured with “shared services agreements” with NAfME whereby we are essentially donating the staff time and related services to get these organizations going. They are different, however, in that Give a Note is an independent foundation, with its own board; Support Music Group is a Limited Liability Corporation wholly owned by NAfME.

For more information, please note the availability of the following:

Past financial statements and audit reports are posted on the NAfME web site at [http://musiced.nafme.org/about/nafme-financial-statements/](http://musiced.nafme.org/about/nafme-financial-statements/)

Budgets for past years may be accessed by NAfME and Federated State Association leaders at [http://executive.nafme.org/nafme-budget/](http://executive.nafme.org/nafme-budget/)

Specific information may be requested from:

- Paul Baker, CFO paulb@nafme.org
- Mike Blakeslee, COO mikeb@nafme.org