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Advocacy | Learning | Networking

Empowering Colorado education leaders through advocacy, professional learning and networking to deliver on the promise of public education.

CASE STRATEGIC PLAN 2017-18

BACKGROUND	
LEGAL NAME AND ADDRESS	Colorado Association of School Executives
TIME PERIOD IN EXISTENCE	1969
LEGAL STATUS OF ORGANIZATION	The Association reports results on its activity as a tax-exempt organization as permitted by Internal Revenue Code (IRC) 501(c)(6). The Center reports results on its activity as a tax exempt organization as permitted by IRC 501(c)(3).
STAFFING PROFILE AND STRUCTURE	CASE Board of Directors; 7 Departments, each with its own board of directors; Executive Director; CASE Staff

MISSION
The mission of CASE is to empower Colorado education leaders through advocacy, professional learning and networking to deliver on the promise of public education.

VALUES
<p>CASE will inspire visionary leadership for education by:</p> <ul style="list-style-type: none"> Modeling the highest moral and ethical behavior; Fostering a positive environment for high student achievement; Providing personal and professional development; Serving as a strong and influential voice for education leaders; Facilitating communication among education leaders

WHO WE SERVE
<i>Membership / Audience Demographic</i>
CASE represents Colorado public school administrators from across the state. Our membership is organized into seven job-alike groups that include superintendents and senior administrators, principals, CFOs and business managers, human resources administrators, education technology leaders, and administrators who work in assessments, curriculum, communications, and more. In addition to practicing school administrators, CASE also serves aspiring and retired public education leaders. Professional organizations with a mission of supporting public education can also join CASE as commercial or institutional members.

Goals

M = Membership; C = Communications; A= Advocacy; PL= Professional Learning

M: To have the types and levels of membership that meet the desire and needs of current and future CASE members

C: To provide timely and relevant information to our members that supports their awareness and knowledge of the current education policy environment

A: To impact laws, policies and regulations that affect the educational practice and funding for students of Colorado.

PL: To support education leaders by providing learning opportunities that ensure individual access to the knowledge, skills, networks and tools they need to deliver on the promise of public education

ALL: To be fiscally responsible and solvent in order to sustain capacity to serve members that is aligned with our mission and goals

Strategies

C - 1. Create templates and/or place where members can share existing communication practices – such as budget, policy, letters

M - A 2. Provide member training on legislative involvement (testifying on bills, working with legislators)

C - A 3. Develop a formalized process to provide increased opportunities for membership voice, input and feedback

A - 4. Annual development of CASE platform

PL - 5. Use of blended learning threaded through a topic strand(s) through the year

M - PL - 6. Develop a menu plan (and determine how and when PL is blended through membership)

M - 7. Create a balanced budget for both short and long term planning

ACTION #1 PLAN - Clearinghouse of communications templates/resources

BEGIN & END DATES	ACTION	RESOURCES - COST, TIME, TEAM MEMBERS	Notes
8/15/17 to 10/1/17	Solicit examples of templates and documents from our members	Time: Through email, social media, and at meetings, ask members to share templates or documents that would be useful to other administrators. Estimated time to solicit and review documents: 25-35 hours. Team members: Director of Membership and Strategic Partners and Communications Specialist.	After initial solicitation, outreach should be ongoing to ensure content stays fresh
8/15/17 to 12/1/17	Identify issues of interest and needs of our members	Time: Brainstorm with leadership team about areas of need and interest to members. Vet these ideas with department boards via email and at spring board meetings. Compile list based on feedback. Total time estimate is 30-50 hours including department board meetings. Team members: Leadership team and Communications Specialist.	End date of 12/1/17 will allow for time to vet ideas and get feedback from dept. boards at Sept and Nov meetings
4/1/17 to 9/1/17	Review national organizations templates and resources (e.g. AASA)	Time: contact national associations in addition to reviewing websites to compile list of templates and resources. Estimated 25-35 hours. Team members: Director of Membership and Strategic Partners.	
6/1/17 to 11/1/17	Identify vehicle or structure to house resources and documents and develop and populate with resources	Time: after determining best structure or vehicle to house resources, will need to develop it and populate with resources. Depending on structure, might need to work with YM to ensure functionality is available with website. Estimated 40-60 hours. Team members: Director of Membership and Strategic Partners and Communications Specialist.	
7/1/17 to 11/15/17	Create communication plan to provide information to members	Time: estimated 3-5 hours to develop initial communications plan. Team members: Director of Membership and Strategic Partners.	

ACTION #2 PLAN - Member training on legislative involvement

BEGIN & END DATES	ACTION	RESOURCES - COST, TIME, TEAM MEMBERS	Notes
8/15/17 to 10/1/17	Identify modes of presentation - in person, on-line, recorded webinars	Time: estimated 10-15 hours total, including initial conversations and then later discussions to match presentation format with topics. Team members: CASE Director of Membership and Strategic Partners, CASE Director of Professional Learning, CASE Lobbyist	
7/28/17 to 10/1/17	Identify areas of interest and needs of our members, based on feedback from members	Time: CASE team members to brainstorm initial list of areas of interest and need, then will share with department boards, CASE Legislative Committee, and Coordinating Council to seek their input. Estimated time 30-40 hours, including board and CC meetings. Team members: CASE Executive Director, CASE Lobbyist, CASE Director of Membership and Strategic Partners.	Start date to include solicitation of feedback during leg update breakout at Convention. End date allows for Sept dept. meetings
9/15/17 to 11/1/17	Identify content for inclusion and solicit member feedback	Time: based on topics identified by staff and CASE members, need to develop content for each interest area. Estimated time: 60-80 hours. Team members: CASE Executive Director, CASE Lobbyist, CASE Director of Membership and Strategic Partners	
9/1/17 to 11/15/17	Design train the trainers model for implementation	Time: This action is linked to the identification of content and estimated total time is 60-80 hours. Team members: CASE Director of Professional Learning, CASE Director of Membership and Strategic Partners, CASE Lobbyist	

ACTION PLAN #3 - Process to obtain member input

BEGIN & END DATES	ACTION	RESOURCES - COST, TIME, TEAM MEMBERS	Notes
9/1/17 to 11/1/17	Review current practices and identify what has been effective	Time: estimated 15-25 hours, including preparing report summarizing past and current practices. Team members: Leadership team with Director of Membership and Strategic Partners taking lead on report preparation.	
9/1/17 to 11/30/17	Identify topic areas members want to have opportunities for input	Time: in addition to team members identifying topics, feedback should be solicited from CASE members via survey and during CASE department meetings. Estimated 30-40 hours, including creation of survey and meeting with department boards and Membership Committee. Team members: Leadership team and CASE Lobbyist.	Will solicit feedback from Coord Council at Sept or Nov meeting
11/1/17 to 12/15/17	Determine the best vehicle and/or process for members to provide feedback	Time: member input will drive decisions about best process to solicit feedback. Estimated time 20-30 hours. Team members: Director of Membership and Strategic Partners, Director of Professional Learning, Communications Specialist	
1/1/18 and ongoing	Use coordinating council and membership committees as feedback groups on developed processes & procedures	Time: after initial solicitation of feedback, outreach for input should be ongoing. Estimated 20-30 hours to get initial responses on developed processes and procedures. Team members: Leadership team.	Feedback should be solicited on an ongoing basis

ACTION #4 PLAN - CASE Platform

BEGIN & END DATES	ACTION	RESOURCES - COST, TIME, TEAM MEMBERS	Notes
6/1/17 to 7/1/17	Review expired platform documents	Time: 4 hours Team Members: Case Executive Director, Assistant to the Executive Director	
8/1/17 to 10/1/17	Recruit members to the platform committee	Time: 5 hours Members: CASE Staff - CASE Department Chairs	
7/1/17 to 8/1/17	Develop process (as stipulated in bylaws) for deciding how the platform is created including the process for member feedback and consensus of the proposed platform	Time: 5 hours Members: CASE Staff - CASE Department Chairs	
9/21/17 to 9/22/17	At the Superintendents Fall Conference, have members review draft platform created from Superintendents Visioning Project work and prior platforms	Time: 3 hours Members: CASE Staff - CASSA board - Superintendents - Facilitator Cost: \$500	
9/25/17 to 10/2/17	Create initial Platform draft that will be used by Platform Committee (Legislative Committee)	Time: 10 hours Members: CASE Staff	
10/2/17 to 10/9/17	Convene Platform committee (Legislative Committee) and finalize initial draft	Time: 5 hours Members: CASE Staff - Department Chairs	
10/9/17 to 10/26/17	Implement process for membership feedback	Time: 4 hours Members: CASE Staff	
11/20/2017	Coordinating Council adopts CASE platform	Time: 2 hours Members: Coordinating Council	
Ongoing	Develop communication plan on the CASE platform	Time: 5 hours Members: CASE Staff - CASE Department Chairs	

ACTION #5 PLAN - Create a Year-Long Blended Learning Strand

BEGIN & END DATES	ACTION	RESOURCES - COST, TIME, TEAM MEMBERS	Notes
5/1/17 to 8/30/17	Identify topics through feedback from members and the professional learning advisory group	Time: 60 - 80 hours (including department meetings and PLAG) Team Members: Director of Professional Learning, Department Liaisons, Professional Learning Advisory Group	
5/1/17 to 10/30/17	Determine the best formats and opportunities for participation, including ASAE conference on learning design, meetings with ASAE, AASA and Learning Forward about best practices in blended learning.	Time: Ongoing, 60-80 hours throughout the season. Team Members: Director of Professional Learning	
8/30/17 to 1/30/18	Building out tools or obtaining tools to ensure the strands are truly blended learning opportunities for members across the state, including potential speakers, webinars, workshops series, etc.	Cost: \$0 -- \$25,000 Time: 10-12 hours/weekly Team Members: Primarily Director of Professional Learning, CASE Support staff	
February 2018	Launch 2018 Blended Learning Topic	Time: 20 hours, 2-4 ongoing hours Team Members: Director of Professional Learning, Director of Membership, Communications Specialist and Limited Staff Team	Launch coinciding with/following the Winter Leadership Conference to allow us to use the conference as a launch and provide training, marketing, etc.
11/30/17 to Spring 2018	Identify relevance to all departments and opportunities for involvement from departments.	Time: Department Meeting Time Team Members: Director of Professional Learning, Department Liaisons	This is an ongoing event, prior to and following the launch as we continue to add information to the blended learning strand.
2018	Determine how the strands may align with existing conferences and events	Cost: \$0 -- \$5000 as CASE may seek to bring in speakers aligned with the blended learning topic to our events. Time: Ongoing, department events and regional meetings Team Members: CASE Leadership Team, CASE Staff	We can consider this at the 2018 Convention, the 2018 Supts Conference, CASPA Conference and the 2019 Winter Leadership Conference

ACTION #6 PLAN - Create a "menu" of options for both Professional Learning and Membership

BEGIN & END DATES	ACTION	RESOURCES - COST, TIME, TEAM MEMBERS	Notes
2/10/17 to 10/1/17	Review other member associations' structures for membership and benefits	Time: 15-20 Hours Team Members: Director of Professional Learning and Director of Membership	
1/1/17 to 10/1/17	Review current membership data and analyze to determine member participation data for conferences, workshops, etc.	Time: Ongoing and moderate (10 hours monthly) Team Members: Director of Membership, Director of Professional Learning, CASE Staff	Pending completion of membership analysis to support this data
1/1/17 to Fall 2017	Complete membership study that is analyzing general membership patterns over time	Time: Ongoing and moderate Team Members: Executive Director, Director of Membership	

Fall 2017 to Fall 2018	Develop proposals, including cost analysis, to present to the membership committee and professional learning advisory group; develop proposals to bring forward to the Coordinating Council and determine a pilot	Time: Ongoing, 10 hours/weekly Team Members: Director of Membership, Director of Professional Learning, CASE Membership Committee, CASE Professional Learning Advisory Group	Pilot in the 2018-2019 year
Winter Leadership Conference 2019	Develop proposals to take to the general membership (per bylaws) based on data from pilot	Time: Ongoing and heavy, time will need to be allotted at the 2019 Winter Leadership Conference Team Members: Leadership Team, Staff Team, Coordinating Council	

ACTION #7 PLAN - Balanced Budget

BEGIN & END DATES	ACTION	RESOURCES - COST, TIME, TEAM MEMBERS	Notes
6/1/17 to 8/1/17	Create reporting that tracks revenue & expenditures monthly that can be utilized by all leadership team staff	Time: 15 hours Members: Finance Director	
1/1/17 to Fall 2017	Complete membership study that is analyzing general membership patterns over time to project future membership revenue	Time: 40 hours Members: Executive Director, Director of Partnerships & Membership	
4/1/17 to 10/1/17	Analyze sponsorship/grant revenue over the past 5 years to determine strategies to increase revenue for the next five years	Time: 15 hours Members: CASE Staff	
4/1/17 to 10/1/17	Analyze current expenditures to determine possible areas for reduction in order to support a balanced budget	Time: 15 hours Members: Finance Director, Leadership Team	
4/1/17 to 7/17/17	Evaluate the alignment of the current CASE structure to the CASE strategic plan to help ensure CASE as an organization is able to achieve it's goals	Time: Ongoing Members: Executive Director, CASE staff, Coordinating Council	

MEASUREMENTS OF SUCCESS

Measurable Component Description	How to Measure	When to Measure	Notes
M: To have the types and levels of membership that meet the desire and needs of current and future CASE members	1 - Count of members that report the types and levels of membership meet their desires and needs; 1 - Qualitative analysis of information provided by aspiring leaders; 2 - Change in membership (membership reports)	1 - Biennial member survey - Fall 2018, Fall 2020 2 - Monthly Membership Reports	Include information in yearly membership report
C: To provide timely and relevant information to our members that supports their awareness and knowledge of the current education policy environment	1 - Count of members reporting that information provided by CASE supports their awareness and knowledge of the current education policy environment	1 - Biennial member survey - Fall 2018, Fall 2020; Evaluation of legislative trainings	Department boards would like this information
A: To impact laws, policies and regulations that affect the educational practice and funding for students of Colorado.	1 - Bill tracker document use; 2 - Satisfaction of members with Bill tracker document; 3 - Count of members trained on legislative involvement; 4 - Satisfaction of members with training on legislative involvement	1 - May 2018; 2 - May 2018; 3 - June 2018; 4 - Evaluation immediately after trainings	Track use by department when possible - make trainings available at board meetings
PL: To support education leaders by providing learning opportunities that ensure individual access to the knowledge, skills, networks and tools they need to deliver on the promise of public education	1 - Count of CASE education leaders that report they have access to learning opportunities that provide individual access to the knowledge, skills, networks and tools they need; 2 - Satisfaction of CASE education leaders with learning opportunities they have participated in	1 - Biennial member survey - Fall 2018; Fall 2020; 2 - Evaluation immediately following professional learnings	Consider placing all evaluations into a yearly professional learning report for the professional learning committee and coordinating council
ALL: To be fiscally responsible and solvent in order to sustain capacity to serve members that is aligned with our mission and goals	1 - Balanced annual budget; 2 - Monthly financials; 3 - financial updates provided at each Coordinating Council Meeting	1 - September 1 of each year; 2 - By 15th of the following month; 3 - Coordinating council meetings (6 times per year)	

MARKETING & COMMUNICATION PLAN

GROUPS MOST SERVED

CASE Coordinating Council, CASE department boards, CASE Legislative Committee, CASE Membership Committee, general CASE membership

WHAT THE AUDIENCE NEEDS TO HEAR

Regular updates on status of action items; measurable findings from success metrics (if applicable); member feedback and input; upcoming next steps

BEST WAY TO REACH & COMMUNICATE

Incorporate standing strategic plan update agenda item to all Coordinating Council and CASE department board meetings. Add written update to one of two monthly *Communication Matters* member email communications.

COMMUNICATION SCHEDULE & FREQUENCY

Verbal updates at quarterly Coordinating Council and department board meetings. Written updates included once per month in *Communication Matters* member communication.

HOW TO MEASURE MESSAGE REACH

Track key email metrics: number of emails delivered, number of emails opened; click-through rate (if applicable). Track member attendance at each Coordinating Council and department board meeting.