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

## CASE STRATEGIC PLAN 2019-2022

### 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

CASE will inspire visionary leadership for education by:  
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

#### Membership / Audience Demographic

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
<i>M = Membership; C = Communications; A= Advocacy; PL= Professional Learning</i>
M: To increase membership by evolving our relevance for a diverse audience of prospective members
A: To proactively impact laws, policies and regulations that affect the educational practice and funding for students of Colorado
C: To provide timely, relevant, multi-faceted information to our members that supports their awareness and knowledge of the current education environment
PL: To support education leaders with 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
M - Grow and expand affiliate membership agreements
A - Build member capacity and expertise for policy advocacy
A - Annual development of CASE platform with stated legislative priorities
C - Modernize the CASE website
C - Create templates and/or place where members can share existing communication practices
PL - Develop and implement new professional learning models for the professional learning program
PL - Recreate the mentoring and coaching programs
PL - Develop a plan of professional learning events and opportunities
ALL - Create a balanced budget for both short and long term planning

### ACTION #1 PLAN - Grow and expand affiliate membership agreements

BEGIN & END DATES	ACTION	RESOURCES - COST, TIME, TEAM MEMBERS	Notes
11/1/2018 - 2/15/2019 - 2020 - 2021	Create list of potential Affiliate districts	Time: 2 hours - Members: CASE Staff - CASE Management Team, Coordinating Council, Departments	
2/15/2019 - 5/1/2019 - 2020 - 2021	Conduct Cost/Benefit analysis of identified district memberships that includes information on attendance at Convention, Winter Conference and other events	Time: 10 hours - Members: CASE Staff	
5/1/2019 - 5/15/2019 - 2020 - 2021	Create individual Affiliate draft contracts	Time: 2 hours - Members: CASE Staff	
5/15/2019 - 8/30/2019 - 2020 - 2021	Contact leadership members from identified districts and set up meetings	Time: 10 hours - Members: CASE Staff, Departments	
9/1/2019 - 2020 - 2021	Start Affiliate agreements September 2019 - Annually 2020 - 2021	Time: 5 hours - Members: CASE Staff	Time is to set up database identifying affiliate members

### ACTION #2 PLAN - Build member capacity and expertise for policy advocacy

BEGIN & END DATES	ACTION	RESOURCES - COST, TIME, TEAM MEMBERS	Notes
9/15/19 to 11/15/19 - 2020 - 2021	Hold joint department regional meetings with area legislators - Meeting includes training on advocacy and training on Voter Voice	Time: 40 hours - Members: CASE staff. Use of Voter Voice at each meeting - covered by subscription. Refreshments - covered by departments and travel budgets	Schedule to be created with legislative aids and CASE departments
1/1/19 to 5/1/19 - 2020 - 2021	Hold a CASE day at the capitol - include advocacy training at the beginning of the day	Time: 10 hours - Members: CASE Staff. Refreshments and lunch covered by CASE budget	Recruit members to attend during the regional meetings.
1/1/19 to 5/1/19 - 2020 - 2021	Use of Zoom during Legislative Committee Meetings	Time: 5 hours - Members: CASE Staff. Cost - Purchase of better camera and microphone for use during meetings	

### ACTION #3 PLAN - CASE Platform

BEGIN & END DATES	ACTION	RESOURCES - COST, TIME, TEAM MEMBERS	Notes
8/1/2019 to 10/1/2019 - 2020 - 2021	Recruit members to the platform committee	Time: 3 hours - Members: CASE Staff - CASE Department Chair	
9/1/2019 to 9/30/2019 - 2020 - 2021	At the Superintendents Fall Conference, have members review current platform and brainstorm legislative priorities for the upcoming legislative session	Time: 3 hours - Members: CASE Staff - CASSA board - Superintendents - Facilitator Cost: \$500	
9/25/2019 to 10/2/2019 - 2020 - 2021	Create initial legislative priorities draft that will be used by Platform Committee (Legislative Committee)	Time: 10 hours - Members: CASE Staff	
10/2/2019 to 10/9/2019 - 2020 - 2021	Convene Platform committee (Legislative Committee) and finalize initial draft	Time: 5 hours - Members: CASE Staff - Department Chairs	
10/9/2019 to 10/26/2019 - 2020 - 2021	Implement process for membership feedback	Time: 4 hours - Members: CASE Staff	
11/8/2019 - 2020 - 2021	Coordinating Council adopts CASE platform and strategic priorities for next legislative session	Time: 2 hours - Members: Coordinating Council	
Ongoing	Develop communication plan on the CASE platform and legislative priorities	Time: 5 hours - Members: CASE Staff - CASE Department Chairs	

#### ACTION #4 PLAN - Modernize the CASE website

BEGIN & END DATES	ACTION	RESOURCES - COST, TIME, TEAM MEMBERS	Notes
5/1/2019 to 6/1/2019	Review options for Your Membership website redesign packages; select a package	Time: *hours - Members: CASE Leadership team to review redesign options and make selection.	YM offers several website redesign packages at varying price points
6/1/2019 to 6/15/2019	Meetings to get input about key priorities for new website (functionality, navigation, style, etc.)	Time: 10 hours - Members: CASE Staff - Volunteers from Coordinating Council	
6/15/2019 to 6/30/2019	Initial design consultation with Your Membership	Time: 3 hours - Members: CASE Staff	
7/1/2019 to 11/1/2019	Work with Your Membership on redesign items including: Homepage; Subpage styling; Mobile email design; and Complete design and style guide	Time: 40-80 hours - Members: CASE staff	YM estimate is 12-15 weeks for comprehensive redesign package
11/1/2019 to 11/15/2019	Determine date for new CASE website to go live and make the switch	Time: 10 hours Members: CASE Staff - Volunteers from Coordinating Council	Announce to members upcoming redesign website - trouble shoot
11/16/2019 to 12/15/2019	Member communication highlighting key new or redesigned features of the website	Time: 10 hours Members: CASE Staff	

### ACTION #5 PLAN - Create templates and/or place where members can share existing communication practices

BEGIN & END DATES	ACTION	RESOURCES - COST, TIME, TEAM MEMBERS	Notes
6/15/2019 to 6/30/2019	Develop proposed plan for improved communication clearinghouse based on audit and staff feedback	Time: 15 hours - Members: CASE Staff	
7/1/2019 to 9/1/2019	Redesign and implementation of communications clearinghouse (to be informed by overall website redesign as appropriate)	Time: 30 hours - Members: CASE Staff	Timing must allow for heavy staff workload related to CASE Conventions
7/1/2019 to 6/30/2020 - Ongoing	Solicitation of communication templates/best practices from members and partner organizations (i.e. COSPRA)	Time: 10 hours Members: CASE Staff	
8/15/2019 to 11/15/2019	Market redesigned clearinghouse to members	Time: 10 hours Members: CASE Staff	Including a minimum of 4 communications
9/1/2019 to 11/15/2019 - repeated quarterly	Determine perceived usefulness of clearinghouse by assessing use and soliciting member feedback	Time: 15 hours - Members: CASE Staff	

### ACTION PLAN #6 - Develop and implement new professional learning models for the professional learning program

BEGIN & END DATES	ACTION	RESOURCES - COST, TIME, TEAM MEMBERS	Notes
4/1/2019 to 10/1/2019	Purchase ZOOM A/V for an additional option for workshops, trainings and other meetings - train CASE staff, Coordinating Council and department boards	Cost: \$200 annually for Zoom - Time: 20 hours - Members: CASE Staff and CALET Department	Additional cost of \$800 for camera to enhance ZOOM meetings
Winter Leadership Conferences & Summer Conventions - 2019 - 2020 - 2021	Introduce FLASH sessions at Summer and Winter events - these provide attendees a 'flash' of information from presenters in a shorter period of time than typical sessions	Time: 15 hours - Members: CASE Staff	Designed to save A/V costs by lessening overall needs for A/V
4/22/2019 to 4/23/2019	Attend a National Professional Learning Conference to learn about other models of professional learning used in associations like CASE	Time: 2 days - Members: CASE Staff	Conference put on by the Michigan Assoc School Executives
7/1/2019 to 10/1/2019	Google drive created for all departments to access agendas, minutes, email	Time: 30 hours - Members: CASE Staff and CALET Department	Intended to enhance communication/trainings for all departments

### ACTION #7 PLAN - Recreate the mentoring and coaching programs

BEGIN & END DATES	ACTION	RESOURCES - COST, TIME, TEAM MEMBERS	Notes
6/1/2019 - 9/1/2019	Research other coaching/mentoring programs in other states and review CASE's past history of these programs. Analyze what worked and what needed improvement	Time: 20 hours - Members: CASE Staff	Need to delete current information from website and publications
8/1/2019 - 9/15/2019	Develop a survey to assess what is needed in the coaching/mentoring programs	Time: 5 hours - Members: CASE Staff	Survey for departments and members
8/1/2019 to 9/30/2019	Meet with retired superintendents to gather their feedback and to recruit instructors	Time: 5 hours - Members: CASE Staff - retired superintendents	
8/1/2019 to 9/1/2019	Research other regional superintendent cohorts similar to the current Western Slope Superintendent Cohort	Time: 3 hours - Members: CASE Staff	
10/1/2019 to 11/1/2019	Start of implementation of new coaching/mentoring program	Time: 5 hours - Members: CASE Staff - departments	
1/1/2020 to 3/1/2020	Integrate the new coaching/mentoring programs into our current Aspiring to the Principalship Program and New Superintendents Workshop	Time: 5 hours - Members: CASE Staff - course instructors	

### ACTION #8 PLAN - Develop a plan of professional learning events and opportunities

BEGIN & END DATES	ACTION	RESOURCES - COST, TIME, TEAM MEMBERS	Notes
6/1/2019 to 10/1/2019	LEAD Program - Survey past participants for ways to improve the learning and develop a 10 year celebration for the program	Time: 4 hours - Members: CASE Staff	
10/1/2019 to 11/1/2019	Partner with Corwin to offer a PLC + 2 day workshop. the focus of these workshops is for leaders and teams to attend a deep learning of the PLC process including the examination of the impact on student learning	Cost: \$200 for CASE - Time: 5 hours - Members: CASE Staff	
Fall 2019 - ongoing	Restructure Regional Meetings - noted under Advocacy Action #2 Plan	Time: 40 hours - Members: CASE staff. Use of Voter Voice at each meeting - covered by subscription. Refreshments - covered by departments and travel budgets	Schedule to be created with legislative aids and CASE departments
Fall 2019 - ongoing	Explore other topic areas for professional learning with membership	Time: Ongoing part of of regular work	

### ACTION #9 PLAN - Balanced Budget

BEGIN & END DATES	ACTION	RESOURCES - COST, TIME, TEAM MEMBERS	Notes
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5/1/2019 to 6/30/2019 - 2020 - 2021	Formulate/develop assumptions, goals and considerations to be used in preparation of the proposed budget for the next fiscal year	Time: 15 hours - Members: CASE Staff	
6/1/2019 to 6/30/2019 - 2020 - 2021	Present/discuss budget considerations with Coordinating Council at the June meeting	Time: 1 hour Members: CASE Staff - Coordinating Council	
7/1/2019 to 7/31/2019 - 2020 - 2021	Present initial draft of budget at July Coordinating Council meeting at the annual conventions	Time: 1 hour Members: CASE Staff - Coordinating Council	
8/1/2019 to 8/31/2019 - 2020 - 2021	Prepare final draft of annual budget as key factors become more complete	Time: 4 hours - Members: CASE Staff	
9/1/2019 to 9/30/2019 - 2020 - 2021	Adoption of final budget at Coordinating Council Meeting	Time: 1 hour Members: CASE Staff - Coordinating Council	
10/1/2019 to 11/30/2019 - 2020 - 2021	Consider need for any revisions or adjustments to adopted budget	Time: 1 hour Members: CASE Staff - Coordinating Council	



MEASUREMENTS OF SUCCESS			
Measurable Component Description	How to Measure	When to Measure	Notes
M - Grow and expand affiliate membership agreements	1 - Percent change in membership month to month; 2 - Percent change in membership year to year	1 - Monthly; 2 - Annually	
A - Build member capacity and expertise for policy advocacy	1 - Provide an evaluation for participants immediately after training; 2 - Count of members using Voter Voice 1 or more times	1 - Immediately after event; 2 - Monthly	
A - Annual development of CASE platform with stated legislative priorities	1 - Adoption of a 2020 CASE Platform; 2 - Adoption of a strategic priorities document	1 - Prior to the start of the 2020 legislative session; 2 - Prior to the start of the 2020 legislative session	
C - Modernize the CASE website	1 - Date of go-live of new website; 2 - Member satisfaction with the new website	1 - Prior to year end of 2020; 2 - Ongoing	
C - Create templates and/or place where members can share existing communication practices	1 - Proposed plan for new clearinghouse approved by leadership team; 2 - Redesign plan approved by leadership team; 3 - Monitoring use; 4 - Member satisfaction with clearinghouse	1 - By June 30, 2019; 2 - 9/1/2019; 3 - Monthly starting 8/15/2019; 4 - Membership survey, fall 2020	
PL - Develop and implement new professional learning models for the professional learning program	1 - Gant chart created with tasks necessary for implementation; 2 - Evaluations completed by participants	1 - By December 30, 2019; 2 - Ongoing	
PL - Recreate the mentoring and coaching programs	1 - Gant chart created with tasks necessary for implementation; 2 - Evaluations completed by participants	1 - By December 30, 2019; 2 - Ongoing	
PL - Develop a plan of professional learning events and opportunities	1 - Gant chart created with tasks necessary for implementation; 2 - Evaluations completed by participants	1 - By December 30, 2019; 2 - Ongoing	
ALL - Create a balanced budget for both short and long term planning	1 - Adoption of annual balanced budget; 2 - Monthly financials; 3 - Financial updates provided at each Coordinating Council Meeting	1 - September 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			
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.			
COMMUNICATION SCHEDULE & FREQUENCY			
Verbal and written updates at quarterly Coordinating Council and department board meetings.			