

## COPAA Strategic Planning Goals for 2016 to 2020

SPECIFIC OBJECTIVES	ACTION STEPS	LEAD AND CONTRIBUTING MEMBERS	Status
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### Goal 1: COPAA has an active community of 2,500 members.

<p>1. Reduce member attrition by 5% per year to a norm of 20%.</p>	<p>A. Reduce member attrition to 5% per year, by asking members that leave to complete an exit survey which will be used to identify gaps or needs for additional resources for membership.</p>	<p>LEAD: Membership</p> <p>Contributing:</p>	<p><b>Membership</b></p> <ul style="list-style-type: none"> <li>• Every member who lapses is sent the survey link. Only 4 have responded to date this year. Joined for resources and networking. Did not rejoin because: retiring, didn't feel cost justified given small amount of sped practiced, one person upset that posts had to be trimmed on the law list.</li> <li>• Member number is highest ever – 1933. However, attrition decreased only slightly to date in 2017 34% (it was at 35%). 1286/2352 possible members renewed. 636 new members so far this year.</li> </ul>
	<p>B. Increase depth of tangible member benefits or new services to meet the identified needs, as reflected by member input and in exit surveys, by June 2018.</p>	<p>LEAD: Membership</p> <p>Contributing: Committee Amicus Committee Social and Racial Equity Committee, Parent committee</p>	<p>Advocate – Advocate Toolboxes have been created, Denise will work with Advocate Committee to ensure are uploaded in File library on site.</p> <p>SERC has added many new pages as previously reported. Most recent page LGBTQ</p> <p>Parent Committee –provided access to archived webinars to parent member and select fact sheets and publications, such as IEP and Parental Consent created originally for conference handouts.</p>

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			Amicus – presented Endrew F webinar and distributed tip sheet. Other fact sheets being developed.
2. Monitor effects of communication and recruitment	A. Obtain an understanding of needs/challenges/opportunities of members by March 2017	LEAD: Membership Committee  Contributing:	<ul style="list-style-type: none"> <li>New community engagement tool has built-in automated tools to increase member engagement.</li> </ul>
	B. Increase perceived asset value of membership by June, 2018	LEAD: Membership Committee Contributing:	Plan to send out a new survey to members in June 2018 to determine if changes/additions are a perceived benefit.
	C. Increase communication to members regarding benefits of COPAA membership and how to access them by December 2017.	LEAD Membership Committee:  Contributing:	Weekly news continues to go out every Tuesday. Archive of news in PDF will be added to the site. News releases, amicus brief filings and items of note are put in the news area of the site, the amicus brief page, and the recent policy letter page. The annual report will go out in April. All past annual reports are now included on the site.
3. Expand COPAA Community Tools	A. Integrate social networking tools with members only area of the site by December 2017.	LEAD: Staff  Contributing: Membership	Have contracted with and are working on implementation of Higher Logic Community Engagement Platform to replace group function on website. Targeting rollout by March 31,2017, though will do before conference if at all possible.

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	B. Offer increased ways to engage members, showcase accomplishments or share expertise by December, 2017	<b>LEAD: Membership</b>  <b>Contributing:</b> Membership Attorney Committee Advocate Committee Parent Committee, Media Committee	<b>Media</b> – The media committee created the Our Stories section of the website and stories are featured in newsletter when new ones are posted. Social media (Twitter, COPAA Society and COPAA business page) are also used to showcase member accomplishments.
	C. Create a robust online knowledge center that is searchable, discoverable, updatable by members, sharable by January, 2019	<b>LEAD: Staff</b>  <b>Contributing:</b> Membership Attorney Committee Advocate Committee Parent Committee	Staff – All Press releases are posted in NEWS.  Media Training will occur 2 <sup>nd</sup> week in January for State Coordinators. Recording of session and tip sheet will be available to all members by January 15th.
	D. Develop criteria for and system to provide oversight and monitoring to assure quality by August 2018.	<b>LEAD: Staff</b>  <b>Contributing:</b> Membership, Advocate Attorney	

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**Goal 2: COPAA is a diverse civil rights organization whose membership and participation in all COPAA activities reflective of the community of families and professionals that we represent.**

<p>1. Ensure Awareness and removal of implicit bias and structural, financial, cultural and linguistic barriers throughout the organization</p>	<p>A. Implement a plan to mitigate implicit bias throughout all levels of the organization by June 1, 2018.</p>	<p><b>LEAD:</b> SREC <b>Contributing:</b> All Committees</p>	<p><b>SREC</b> – held board training in 2015 and 2016, disseminated implicit bias toolbox to committee chairs. Information added to website. <b>The SREC Chair would like Board discussion on this action item. I would like direction on what future actions the SREC should take on this item. The resources are available, and I would like feedback on what other steps should be taken.</b></p> <p><b>Conference:</b></p> <ul style="list-style-type: none"> <li>• The 2018 conference has sessions targeted to address issues for diverse population.</li> </ul> <p><b>Amicus</b></p> <ul style="list-style-type: none"> <li>• Legal Director continues outreach to other civil rights organizations to increase relationships with partner organizations – within the past quarter includes National Center for Youth Law, Bazelon Center for Mental Health Law, National Down Syndrome Society, Disability Rights. Need to continue outreach to diverse civil rights orgs in Leadership Conference.</li> </ul> <p><b>Training</b></p>
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			<ul style="list-style-type: none"> <li>There is a diverse group of advocates that have worked on SEAT series under Eileen’s lead. (Intro, Seat 2 and Seat 3). Plans are to offer SEAT 1.0 in Spanish in 2018.</li> </ul>
	B. Provide each committee in COPAA with at least 3-4 resources/articles and a checklist to support COPAA’s Social and Racial Equity Committee mission statement by June 1, 2018	<b>LEAD:</b> Staff  <b>Contributing:</b> Social and Racial Equity Committee	<b>SREC</b> - has developed an implicit Bias Tool Kit and distributed it to the chair of each committee. This item is completed.
	C. COPAA committee chairs and COPAA Board Members will actively cultivate and promote growth of diverse COPAA leadership, in conjunction with the Nominations and Membership Committees, to create a direct or more clear path to board membership, in a manner by providing resources, training, leadership	<b>LEAD:</b> Nominations  <b>Contributing:</b> All COPAA Committees	<b>Scholarship/Awards:</b> Notice for Diane Lipton Award has been sent to members. To date the committee has not me further to discuss the possibility of an Impact Award.  <b>The SREC</b> has developed an SREC onboarding Plan to be used

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	opportunities, etc. to committee members and volunteers, by June, 2017		
	D. Achieve full compliance with updated ADA accessibility rules in programs, materials, and communications by January 2018.	<b>LEAD:</b> staff  <b>Contributing:</b> Conference Committee Training Committee	Website fully accessible 2.0 with use of Audioeye  <b>Conference</b> – There are no known ADA accessibility issues for the 2018 Conference. All venues and training materials are accessible.  <b>Training</b> – There are no reported accessibility issues in training.

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	<p>E. Eliminate structural, financial, cultural and linguistic barriers in policies and practices that impact participation from diverse and underrepresented groups in the work of the organization, in leadership, in volunteer opportunities, and in board service by July 1, 2018.</p>	<p><b>LEAD:</b> SREC <b>Contributing:</b> All Committees</p>	<p>20% of members identify as other than Caucasian 25% person with a disability 85% family member with a disability</p> <p><b>SREC</b> – added resource pages to site for diverse populations, translated resource documents.</p> <p><b>The SREC Chair would like Board discussion on this action item. I would like direction from the Board on what actions the SREC should take on this item. I was not involved in the creation of this goal. I am unclear what specific "structural financial, cultural and linguistic barriers in policies and practices that impact participation" are currently the focus of the Board</b></p> <p><b>Conference</b> – No complaints re bias in programming. <b>Amicus</b> – No complaints re bias in our provision of support <b>Training</b> – No complaints re bias in programming <b>Membership</b> – No complaints re bias in membership. 37 \$5.00 scholarship rate memberships have been awarded in 2017 to date.</p>

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2. Continual growth in each membership category, while increasing diverse membership in all categories	A. Add dedicated pages to COPAA’s website that is populated with resources on working with minority students and their families by January 1, 2017.	<b>LEAD:</b> Membership  <b>Contributing:</b> Social and Racial Equity Committee Parent Committee	As previously reported, these pages have been added. New Resources are added as available. SREC is working on Asian page.
	B. Provide members information at least 4 times a year about COPAA and opportunities to be involved, while ensuring that such system takes into account the need to remove implicit bias and structural barriers for participation from diverse or underrepresented groups by January 1, 2018.	<b>LEAD:</b> Membership  <b>Contributing:</b> Social and Racial Equity Committee Parent Committee, Media, Advocate	<p><b>Media</b> – free webinar to train members on “telling their story” and working with press will be available in January. Media chair outreached to the American Writer’s Association for consideration of COPAA doing journalism workshop with COPAA and we had a call between our ED, Media Chair and their staff. Nothing concrete has come of that to date. We will follow-up in January.</p> <p>The SREC participated in the advocate late night call on 10/25/17 and used this forum to share information about the SREC’s work. The SREC plans to continue these calls once per month.</p> <p>Advocate Committee continues late night calls as indicated on report</p>



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	C. Maintain robust data collection regarding membership to include in quarterly reports to Membership and Social and Racial Equity Committees by January 1, 2017.	<p><b>LEAD:</b> Membership</p> <p><b>Contributing:</b> Social and Racial Equity Committee</p>	See Membership data included.
	D. Achieve diverse membership that is proportionate to the general population by identifying gaps, and conducting outreach to support gaps identified, by January 1, 2020.	<p><b>LEAD:</b> Membership</p> <p><b>Contributing:</b> Social and Racial Equity Committee</p>	<p>Membership – what committees do you still need to coordinate with to get this information?</p> <p>In March the SREC identified four national organizations (NAACP, MALDEF, Urban League and ACLU) that have work which is aligned with the work of COPAA as it related to minority students. The SREC has compiled contact information for all regional / local offices for these organizations across the United States.</p> <p>Recommend that SREC and GR Committees and / Staff schedule a joint call to work out a plan and locus of responsibility for increasing partner with these groups.</p>

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	E. Increase diverse membership within each member category, though the use of outreach and partnerships with national, state and regional organizations that serve diverse population(s) by January 1, 2019.	<p><b>LEAD:</b> Membership</p> <p><b>Contributing:</b> Social and Racial Equity Committee</p>	<b>See above</b>
	F. Define the role of parent members within COPAA by January 2, 2017.	<p><b>LEAD:</b> Parent</p> <p><b>Contributing:</b> All</p>	<p>Recommendation: The role of parent members (consistent with COPAA’s stated purpose and work) is to protect the legal and civil rights of students with disabilities and their families on an individual basis (own families and other families as peer-to-peer support), and through systemic efforts and policy action.</p> <p>Parent Committee staffed a table manned a table for COPAA at the CT Special Needs Expo on November 19, 2017</p> <p>20 resources through our website that would otherwise be an additional cost to members have been provided to parent members at no cost as a celebration of our 20th Anniversary. Those resources will remain free and available to all parent members through 2018. We would like to continue this trend and change up the “free” resources to parents each year. Not the same amount but several – perhaps the most popular sessions from the previous Conference or some other theme. Committee put together a one-day pre-conference for Parents at the 2018 COPAA Conference. The pre-conference will include</p>

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			a history of special education law, the six principals of the IDEA, how to communicate and negotiate with your school district, how to be an advocate for your child, additional tools and tricks, and a mock IEP meeting. We hope to expand this to a two-day pre-conference for the 2019 COPAA Conference.
	G. Identify targeted ratio of membership among membership categories. January 31, 2017.	<b>LEAD:</b> Membership <b>Contributing:</b> Parent, Attorney, Advocate Committees	Membership has previously indicated that the goal should be to maintain the historic relative ratio (40 Adv/40 Att/15 Parent/5 All Others). There has been no decision to change that target to date.
3. Provide targeted activities and mechanisms to increase inclusiveness, accessibility and a welcoming atmosphere to all members.	A. Establish a stakeholder group of members, including EC members, to guide work on the objective by December, 2017	<b>LEAD:</b> SREC <b>Contributing:</b> All Committees	<b>SREC</b> – any concerns re inclusiveness expressed to you?  <b>Membership</b> – any welcome steps being taken / planned?

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	B. Design at least 2 specific strategies at the conference and 2 additional opportunities for membership engagement each year by January, 2020.	<b>LEAD:</b> Conference  <b>Contributing:</b> All Committees	<b>Conference</b> – Do you need volunteers for the new member meet and greet?  <b>Membership</b> – What do new members get when they sign up?
	C. Develop plan for COPAA to increase regional presence and visibility at local levels and in diverse or underrepresented communities through outreach, trainings, etc. by Jan, 2019	<b>LEAD:</b> Staff  <b>Contributing:</b> SREC, Training	We need to push the target date for this item. We do not currently have the capacity to do this in addition
	D. Expand COPAA infrastructure and resources available to increase membership engagement and to be the “go to” place for resources and networking for parents and professionals by January 1, 2018.	<b>LEAD:</b> Staff  <b>Contributing:</b> <b>All committees</b>	Higher Logic Community Engagement Tool  People are coming (as evidenced by increased new members, 5000+ Facebook page, almost 4,000 on our member/guest news mailing list and xxxx hits to website.  Will need to figure out a plan to update the library of resources or change how its structured on the site. Am looking into using Higher Logic for that purpose. We do not have staff dedicated to uploading new resources and members not doing so organically. Goal to add a part time Community Engagement Manager to staff by 2019.

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	E. Continue COPAA Weekly update to include 1-2 articles each week that reports on or promotes member engagement.	<p><b>LEAD:</b> Staff</p> <p><b>Contributing:</b> Media Relations Committee Government Relations</p>	<p>It would be helpful to create a calendar that assigns responsibility to committees on a rotating basis to contribute something for newsletter. Denise will create in December for the 2018 and send out reminders to relevant committees a reminder the month ahead.</p> <p>GR and Amicus contribute regularly already.</p>
4. Establish an effective membership recruitment and outreach system that promotes membership growth, enhances visibility, and ensures that COPAA is working to reach underrepresented populations	A. In conjunction with the Social and Racial Equity Committee, develop and implement plan of recruitment and outreach to potential members in all categories that includes measurable outcomes, guidelines for volunteers who conduct outreach, resources about COPAA membership, and a system	<p><b>LEAD:</b> Membership</p> <p><b>Contributing:</b> Media Relations, SREC</p>	<p>Need to schedule a joint call with these committees. Denise will take the lead.</p>

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	for seeking out opportunities to enhance COPAA’s visibility through outreach by January 2018.		
5. Target activities to increase the representation of diverse populations to 35% of board composition.	A. Implementation of Action Steps for Objectives 1 through 4 will aid in achieving this objective.	LEAD: All committees	4 / 7 individuals who submitted nominations for the Board this year meet the diversity criteria. That is a definite increase from previous years where we generally had 1 or 0. Nominations committee has not yet met to review all applicant qualifications or determine who is recommended.

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**Goal 3: COPAA has expanded power and reach through collaborative partnerships to assure each child eligible for services and supports has an equal opportunity to a quality education.**

<p>1. Maintain Status as Leader in Protecting the Legal and Civil Rights of Students with Disabilities and Their Families in Executive, Legislative, and Judicial branches of federal government.</p>	<p>A. By 2020, COPAA will develop, in conjunction with the Government Relations Committee, yearly policy action plans.</p>	<p><b>LEAD:</b> Staff  <b>Contributing:</b> Media Relations Committee, Amicus Committee, Government Relations, Membership,</p>	<p>As evidenced in GR and Amicus reports, COPAA has not only maintained status, but continues to grow in influence in Legislative and Judicial branches. The Executive branch is a challenge in this administration, however, we have met with the leads at the Department of Education and Civil Rights.</p>
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	B. By 2020, COPAA will regularly access and maintain good working relationships with key Congressional staff and agency staff.	<b>LEAD:</b> Staff  <b>Contributing:</b> Media Relations Committee, Amicus Committee, Government Relations	We are frequently called upon by members of Congressional staff to testify at hearings and present/moderate at briefings, submit questions for nominees, meet with Senators and Representatives directly. We engage the services of McKeon Group and work directly with staff to continue to do so.
	C. By 2020, COPAA will coordinate efforts with diverse group of stakeholders who share goals.	<b>LEAD:</b> Staff  <b>Contributing:</b> Media Relations Committee, Amicus Committee, Government Relations, SREC	Still under development, will meet with GR and SREC to develop a plan.
	<del>D. Support volunteer Government Relations Committee decision-making and participation</del>	<del><b>LEAD:</b> Staff   <b>Contributing:</b> Government Relations</del>	Not sure what this means.
	E. Secure 2 Government Relations Interns each year, beginning in 2017	<b>LEAD:</b> Staff  <b>Contributing:</b> Government Relations	We have 2 interns working on COPAA through McKeon Group, will coordinate with Development and LD to create an announcement to send to Law Schools this spring to recruit interns that can work for COPAA directly.



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	F. Identify IDEA reauthorization priorities upon notice of proposed reauthorization of IDEA work	<b>LEAD:</b> Government Relations  <b>Contributing:</b> Media Relations Committee, Amicus Committee,	There is an IDEA Reauthorization sub-committee of GR, though they have not met recently. Members of GR worked with Legal Director in this past quarter to solidify language we will ask for either in standalone amendment or if entire bill is amended (heaven forbid anytime soon) on Expert Witness Fees, Burden of Proof and attorney's fees (Buckhannon). We have long had each of these goals but until recently only had legislative language for Witness Fees.
	G. Articulate 5-6 key policy and litigation goals <del>by June, 2017.</del>  Ongoing	<b>LEAD:</b> Staff  <b>Contributing:</b> Amicus Committee, Government Relations, SREC	Actually we set policy goals each March at the in-person Board meeting. This should be changed to ongoing. Litigation sub-committee is still working on specific Litigation goals, which will target to present by March 2018
2. Build alliances with 8 diverse national organizations on joint policy actions, initiatives, trainings and litigation	A. Identify national, regional, and state organizations whose goals are consistent with COPAA's goals on diversity and civil rights and that have state level presence by March, 2017.	<b>LEAD:</b> Staff  <b>Contributing:</b> Government Relations, SREC	As above

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3. Develop a grassroots community organizing strategy to amplify family voices on key policy issues at the state and federal levels	A. Identify areas where COPAA presence is limited, and identify targeted areas, by March, 2017	LEAD: Staff Contributing: Government Relations, SREC	We have state level coordinators identified and a page on the site for state advocacy.
	B. Develop scheduled COPAA briefing calls for local leaders by January 2017.	LEAD: Staff Contributing: Government Relations	Monthly briefing calls started in October for state coordinator and are held the second Tuesday of the month.
	C. Increasing COPAA's legislative presence at the state and federal levels by April, 2018.	LEAD: Staff Contributing: Government Relations	We have weighed in recently on state specific issues in TX, FL and NY. State coordinators are creating plans for their individual states.
	D. By June 2018, COPAA will identify local leaders to build alliances with to increase efficacy in shaping policy in priority areas at the state level.	LEAD: Government Relations, SREC	See state level page. Still looking for volunteer coordinators in select states.
4. Engage and empower COPAA Members to amplify voice in policy decisions at all levels of government.	A. Replace listserv with a more robust module that allows for targeted subject or state discussion lists and includes online political action center by June, 2017.	LEAD: Staff	Higher Logic Community Engagement Platform as above.

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### Goal 4: COPAA will have a clearly articulated legal and advocacy strategy and the capacity to provide direct legal intervention and support on priority issues.

<p>1. Initiate or join 2 impact litigations with COPAA as participating counsel</p>	<p>A. COPAA will establish criteria for initiating and/or joining direct impact litigation in our priority areas. Define structure for accepting cases and scope of representation, by January 2018</p>	<p>LEAD: Staff Contributing: Amicus</p>	<p>Litigation workgroup is drafting, will target submission for March 2018</p>
	<p>B. COPAA will develop a litigation staffing plan to develop the capacity to assess and participate in impact litigation. This includes ensuring there is sufficient staffing and financial resources to adequately undertake and support the litigation, by January 2019</p>	<p>LEAD: Staff Contributing: Amicus</p>	<p>To be completed when the above is done.</p>

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	C. COPAA will proactively conduct outreach to underserved communities and populations in order to identify, potential direct impact litigation that impacts those communities, by January 2018	LEAD: Staff Contributing: Amicus	The amicus committee has been flooded with requests and briefs, writing at an unprecedented level. Selene continues to outreach to partners such as National Youth Law Center, Bazelon and others in general.
2. Continue to assist others and increase capacity to file amicus briefs where our voice may improve the law and provide increased levels of technical assistance in cases of national, circuit, or state significance.	A. COPAA will continue to review its criteria for initiating and/or accepting Amicus Brief requests in our priority areas.	LEAD: Staff Contributing: Amicus	Amicus committee has increased numbers of briefs, TA, member moot courts over the past year. Co-chairs, Legal Director, and ED are planning to meet soon to discuss structure and process to assure capacity to meet need.
	B. Monthly outreach/Notice on COPAALAW and COPAA lists regarding availability of technical assistance through our Amicus Committee.	LEAD: Amicus	The good work of amicus speaks for itself as evidenced by the increase in requests. Recommend table this until such time as it appears necessary.

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3. COPAA will identify and reduce structural, financial, cultural and linguistic barriers that limit access to litigation and advocacy support	A. Identify structural, financial, and linguistic barriers that may limit access to litigation and advocacy support January 2017	LEAD: SREC  Contributing: Amicus	Amicus: Is this still a good idea given our impacted schedule?  SREC – have you heard any complaints re this and what would be helpful?
4. COPAA will develop a litigation staffing plan to develop the capacity to assess and participate as amicus around the country. This includes ensuring there are sufficient staffing and financial resources to adequately undertake and support the litigation	A. To be undertaken when issue is ripe to act upon	LEAD: Staff  Contributing: Amicus	See above
5. By December, 2017 COPAA will establish a mentoring-type system.	A. Advocate, Attorney and possibly Parent Committees to develop a plan.	LEAD: Advocate, Attorney, Parent Committees	Attorney committee CAMP mentoring program is in full swing. See Attorney Committee Report

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### Goal 5: COPAA is the leading national authority and resource on educational rights of students with disabilities and their families.

<p>1. Publish and disseminate at least one legal and one advocacy strategy article per quarter.</p>	<p>A. Beginning In 2016, COPAA will submit for publication one law review article every calendar year.</p>	<p>LEAD: Staff  Contributing: Amicus / Litigation work Group</p>	<p>Due process paper was published in October, 2017 in Barry School of Law Journal. Will explore topic for 2018</p>
	<p>B. Beginning in 2016, COPAA will publish 8 articles per year to the COPAA website.</p>	<p>LEAD: Staff  Contributing: Amicus / Litigation work Group</p>	<p>Ongoing</p>
	<p>C. Beginning in 2016, COPAA will contact 10 outside advocacy and disability rights organizations in an effort to publish guest blogs on the COPAA site.</p>	<p>LEAD: Staff  Contributing: Amicus / Litigation work Group</p>	<p>Ongoing</p>
<p>2. COPAA will review and update the web-based library each quarter so that it has current authority, and is easy to use.</p>	<p>A. By January of 2017, COPAA's Training Committees will create a subcommittee representative of all membership categories, to quarterly review the web-based library.</p>	<p>LEAD: Staff  Contributing: Training Committee</p>	<p>Ongoing</p>

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3. COPAA will translate key publications into Spanish, and explore the costs and demands for other languages	A. By November of 2016, COPAA will translate 8 articles into Spanish.	LEAD: Staff Contributing: SREC	Completed several documents - Ongoing
	B. By November of 2016, COPAA will survey its members for language needs and obtain quotes for translation for translation of the same 8 articles in the three most indicated languages other than Spanish within twelve months.	LEAD: Staff Contributing: SREC	Completed first round in Spanish, will survey members in first quarter of 2018 for additional needs.  SEAT 1.0 is targeted to be provided in Spanish in 2018.
4. COPAA will survey the membership on issues of importance and research based resources	A. COPAA will create an Issues of Importance Survey to disseminate to its membership by December 2016.	LEAD: Staff Contributing: Membership, Gov Reltaions	This was completed and acted upon relating to public school dollars and protecting.
5. COPAA will increase its quality training opportunities for students and young adults (those eligible for services under IDEA and/or Section 504	A. COPAA will continue to work towards creating a COPAA Advocate Network across all 50 states.	LEAD: Advocate Committee Contributing: Membership, Gov Reltaions, SREC	The Advocate Committee Launched the 50 state network recently, led by Michael Kaczor. Cynthia, Denise, David and Michael met recently to discuss purpose, parameters, etc. Agreed to use a Facebook page until the Higher Logic Community Platform is integrated into our site and operational .

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and the ADA), parents, advocates, attorneys, and related professionals.	B. COPAA will continue to ensure that all materials used in its trainings reflect cultural humility, are linguistically competent and accessible	LEAD: Staff Contributing: All Committees	No complaints received
	C. Beginning in 2016, COPAA will provide 2 attorney trainings per year via web-based modules with at least 20 participants per training	LEAD: Amicus Attorney	New Attorney - 12 week online Training just completed with 25 participants. Will explore one additional topic with Amicus/Attorney committee
	D. By December, 2020, COPAA will host 10 regional trainings open to all member categories	LEAD: Staff Contributing: Training Committee	This number is likely high unless we receive grant to do with additional staff. Have not begun to work on this.
	a. Priority for regional trainings will be given to underserved populations/areas	LEAD: Staff Contributing: Training, Membership, SREC	Ongoing



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	E. Beginning in 2017 COPAA will provide trainings on topical issues of importance on the transition rights of students and families under IDEA, and the civil rights of individuals with disabilities for post—secondary life under Section 504 and the ADA, as well as best practices in both areas, for young adults with disabilities (ages 14 to 24)	<b>LEAD:</b> Staff  <b>Contributing:</b> Training Committee	Included in conference and webinars.																																										
	F. New Attorney and SEAT Training to increase reach identify underserved communities by June of 2017	<b>LEAD:</b> Training Committee  <b>Contributing:</b> SREC	SEAT 1.0 to be provided in Spanish in 2018  <table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr> <th></th> <th>2016 –NA Total 32</th> <th>2016 – SEAT Total 61</th> <th>2017  NA 26</th> <th>2017 SEAT 1.0 35</th> <th>2017 SEAT 2.0 59</th> </tr> </thead> <tbody> <tr> <td><b>Caucasian</b></td> <td>13</td> <td>33</td> <td>16</td> <td>22</td> <td>44</td> </tr> <tr> <td><b>African American</b></td> <td>2</td> <td>4</td> <td>1</td> <td>2</td> <td>3</td> </tr> <tr> <td><b>Latino</b></td> <td>1</td> <td>5</td> <td></td> <td>5</td> <td>7</td> </tr> <tr> <td><b>Asian</b></td> <td>0</td> <td>1</td> <td>1</td> <td>1</td> <td>1</td> </tr> <tr> <td><b>Other</b></td> <td>2</td> <td>3</td> <td>1</td> <td>4</td> <td>0</td> </tr> <tr> <td><b>Decline to State</b></td> <td>14</td> <td>13</td> <td>7</td> <td>1</td> <td>4</td> </tr> </tbody> </table>		2016 –NA Total 32	2016 – SEAT Total 61	2017  NA 26	2017 SEAT 1.0 35	2017 SEAT 2.0 59	<b>Caucasian</b>	13	33	16	22	44	<b>African American</b>	2	4	1	2	3	<b>Latino</b>	1	5		5	7	<b>Asian</b>	0	1	1	1	1	<b>Other</b>	2	3	1	4	0	<b>Decline to State</b>	14	13	7	1	4
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## COPAA Strategic Planning Goals for 2016 to 2020

SPECIFIC OBJECTIVES	ACTION STEPS	LEAD AND CONTRIBUTING MEMBERS	STATUS
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### Goal 6: COPAA has an annual operating budget of >\$1,000,000.00.

<p>1. Increase revenue by \$70,000.00 per year through increased membership, conference, training, and donations</p>	<p>A. COPAA has 100% board participation in annual giving 2016-2020.</p>	<p>LEAD: Development Contributing: All Board Members</p>	<p>Currently at 50% - need to reach 100% by end of the year.</p>
	<p>B. By, January 1, 2017 COPAA will have a plan to identify / expand pool of potential donors that identifies targeted quantity and outlines outreach activities.</p>	<p>LEAD: Development Contributing: All Board Members</p>	<p>We were not able to develop a plan yet, however, our work is reaching impressed donors as we received an 8,000 donor from an anonymous person in a DC investor fund.</p>
	<p>C. By, November 2016 COPAA will create levels for Organizational Memberships and implement a recruitment plan by level.</p>	<p>LEAD: Membership Committee Contributing: Development</p>	<p>Levels created and implemented. Development plan still needs to be created. Will target by March 2018</p>

## COPAA Strategic Planning Goals for 2016 to 2020

SPECIFIC OBJECTIVES	ACTION STEPS	LEAD AND CONTRIBUTING MEMBERS	STATUS
	D. COPAA will deliver 4 new topical webinar courses for advanced attorneys and advocates by December 2018.	LEAD: Staff Contributing: Training Committee	Ongoing – we had 4 series, 12 webinars this past year.
	E. By March 2018 COPAA’s annual conference attendance will be 650 or above.	LEAD: Conference Committee	ongoing
	F. COPAA will increase conference sponsorship revenue by 10% each year.	LEAD: Conference Committee	Completed. Sponsor revenue has grown each year for the past 5 years. We lost a diamond level (10,000) sponsor last year, but hope to make up with new sponsors.
	G. COPAA will secure sponsorships for at least one webinar series per year 2016-2020.	LEAD: Conference Committee	Completed, we had 3 webinar sponsors in 2017. Will continue to expand in future years.
	H. Generate at least \$5,000 additional in non-dues revenue through the website by selling advertising and expand use of career center by December 31, 2017.	LEAD: Development Contributing: All Board Members	Need to explore whether use of Career center is of interest. It has gotten little use to date.

## COPAA Strategic Planning Goals for 2016 to 2020

SPECIFIC OBJECTIVES	ACTION STEPS	LEAD AND CONTRIBUTING MEMBERS	STATUS
2. Maintain a reserve equal to at least 50% of the operating budget.	A. Beginning in 2018, COPAA will add a line item to its budget to plan for adding 2-3% of budget annually to reserve.	LEAD: Staff Contributing: All Board Members	We have steadily increased our reserve currently is equal to or above 50%  It difficult to balance budget by adding a line item and growing as necessary. We have added to reserve by staying within or lower than expenses and bringing in more revenue than projected in several categories.
	B. At each June Board meeting to review Financial Statement of the year, the COPAA Board will determine the amount of any revenue over expenses at year end into reserve, or allocate for investment.	LEAD: Staff Contributing: All Board Members	Our accountant, Mary, recommends that we plan to move funds into the reserve or invest as we have almost half of the operating budget in the checking account alone.  We can discuss doing so now, or in June once we have the final year end numbers.
3. Obtain three grants to increase COPAA capacity and reach on key issues	A. Define key programmatic areas for which additional funding will be sought	LEAD: Development Committee Contributing: All Board Members	SEAT to underserved populations, Resources, empowering families
	B. Identify potential funding sources	LEAD: Development Committee Contributing: All Board Members	ongoing

### COPAA Strategic Planning Goals for 2016 to 2020

SPECIFIC OBJECTIVES	ACTION STEPS	LEAD AND CONTRIBUTING MEMBERS	STATUS
	C. COPAA will secure at least one additional grant each year 2018-2020.	<p>LEAD: Development Committee</p> <p>Contributing: All Board Members</p>	We had two in 2016 (NDCD and EdTrust, Two in 2017 (both NCD) and one so far for 2018 (NCD)