PREPARING FOR THE FUTURE
STRATEGIC PLANNING
2015-2017

July 2014 Leadership Institute
Six Step Process

Step 1: A conference call with CEC’s CEO, Board Chair and strategic planning consultant to *craft the agenda*.

Step 2: Review of existing member/stakeholder research conducted by CEC in the past 24 months: membership survey, staff survey, other.

Step 3: Using a professional facilitator, *engage the Representative Assembly* to discussion assumptions of the Future in the Field and assumptions of the Future for Members’ Needs.

Step 4: External consultant *conducted 25+ in-depth personal telephone interviews* after the Board session. Respondents identified by CEC and include various constituencies of the special education community, including some non-members and related association executives.

Step 5: *A Two Day Planning Retreat of Board*, other Key Stakeholders, and Senior Staff in June 2014 at CEC HQ.

Step 6: *Produce a working draft strategic plan* based on meeting notes and flip chart/meeting records.
Existing research

- 2012 Staff Survey
- 2013 CEC Management Study
- 2013 CEC Membership Benefits Assessment
- 2014 Board Meeting Assessment Survey
Engage Representative Assembly

Assumptions—the field:

- Professional Competition and Structure
- Workforce/Student Demographic and Social Values
- Global Economic, Environmental, and Business Factors
- Technology and Science
- Legislation and Regulation (Federal and State)
Assumptions—the members

- Education
- Networking
- Information
- Legislation and Regulation
Conduct in-depth interviews

- Participants were from **17 different states** -- California, Colorado, Florida, Idaho, Illinois, Maryland, Michigan, Minnesota, Mississippi, Nevada, New Hampshire, North Carolina, Pennsylvania, Tennessee, Texas, Virginia, Wisconsin as well as Washington, DC.

- The interviewees represented **various constituencies** of the special education community including some non-members and related association executives.

- **26 telephone interviews were conducted in late April 2014**, and each interview averaged approximately 30-40 minutes in length.
June Retreat

- Review of highlights of the pre-session survey.
- Conduct Compressed High Level Environmental Scan
- Clarify/Affirm Core Ideology (Adaptation of existing statements, as appropriate)
- Develop Envisioned Future
- Determine Goals – Statements of Outcomes We Are Committing To Accomplish (Adaptation of existing work, as appropriate)
- Determine Strategic Objectives – Unsatisfactory Conditions We Want To Change and the Direction of the Change Desired
- Develop Strategies - Statements of the Work Required to Achieve Each Goal and Its Companion Objectives
- Set Priorities Among Strategies
- Discuss Next Steps
Key Themes

- CEC is not a well known “brand”
- Teacher preparation in most specialties within exceptionalities is being done with old models and methods
- Shortage of special educators
- Adherence to school reform, Common Core, and ever-increasing standards and regulations at all levels
- The debate on inclusion still rages on...
- Increase in the number of students with autism, attention deficit deficiency, mental and behavioral issues
- Funding for special education and research
- Organizational complexity
Who does CEC serve?

- Teachers
- Teachers in training
- Students
- Administrators
- University instructors and researchers
- Families
- All of the above?
Common Values

- Passionate about working with people with disabilities
- Advocating for children with disabilities and best practices for teaching children with exceptionalities
- Believing that everyone has inherent dignity and worth
- It is possible for every individual to learn
- Students have the right to full access to education
- What we do makes a difference in the lives of children with exceptionalities and their families
CEC Strengths

- Conference
- Standards
- Advocacy
- Research
- Broad reach in the community
- Professional network
- Professional journals
- Communication and access to information
- Networking at local and state level
CEC Weaknesses

- Declining membership
- Needs of teachers no longer a priority
- Unknown to many teachers
- Need more opportunities to network
- Disparate voices – trying to serve too many stakeholders
- Organizational complexity
- Uninspiring leadership
- Slow to change and adapt to new realities
- Lack innovation or culture supporting innovation
Environmental Scan - Field

- Shortage of teachers
- Insufficient teacher training and preparation
- Increased competition
- Declining resources
- Technology – students, teachers, professional development
- Diversity of student population
- Implementation of Common Core Standards
- Assessments/evaluations – teachers and students
- Advocacy
- Divide between special and general education
Environmental Scan – Member Needs

- High quality and convenient education
- Assistance in using and understanding new technology to work with students with diverse needs
- More outreach to grow membership
- More online tools
- More opportunity for networking
- Advocacy support
Focusing on Outcomes — 3-5 years

Greatest Challenges for CEC

- Financial recovery and stability
- Standards — teacher, student, common core, state
- Membership growth and retention
- Current realities of special education teachers
- Improving cooperation, communication and climate within CEC at all levels
- Being the organization that advocates for children and youth with exceptionalities
## Focusing on Outcomes – 3-5 years

### Most Important Actions
- Ensure financial stability
- Build membership
- Support teachers
- Strengthen CEC by clarifying mission/purpose and renewing its brand
- Strengthen advocacy

### Barriers to Actions
- Financial issues
- Inability to change
- Lack of focus
- Complacent, uninformed members
- Declining members
On the Horizon for the Field
5-10 Years in the Future

Negative Occurrences
- Teacher shortage
- Decreased funding and budget cuts
- Poorly trained teachers
- Inability to make needed changes

Positive Occurrences
- Improved situation for teachers
- Increased funding
- Parental involvement in advocacy
- Cooperation and collaboration
Most Important Outcomes for CEC
10-30 Years

- **Teachers** are supported through information, knowledge, continuing education, regaining respect, training, ensuring what goes on in classroom promotes student success.
- CEC has more influence through increased **advocacy**
- CEC has a **clearly defined mission and vision**
- CEC regains its place in the field as the profession organization for special educators.
- Increased **membership**
- CECs **structure and governance** supports its strategy.
- Collaboration and cooperation between **general and special education**.
Preparing for the Challenges

- Plan for the future
- Make necessary changes
- Define who we are and who we serve
- Prepare to make difficult decisions based on in-depth information and financial impact
- Balance the budget and seek new revenue sources
- Rebuild value proposition
- Build strong leadership
- Focus energy and resources
Stakeholders Top 10

1. **Take a more active role in recruiting future generations** of special educators; make special education a desired career choice.

2. **Revise teacher training programs** so that general education teachers and special education teachers are prepared for the realities and have honed collaboration skills to better work together.

3. **Promote Best Practices** and advocate for policies favorable to the retention of special education teachers.
4. Foster more peer-to-peer connections among members.
5. Create multiple opportunities beyond the annual convention for people with similar jobs to engage in peer-to-peer connections (i.e. urban, rural, specialty, grade level, etc.)
6. Seek ways to build better connections with the general education community; allay fears and put students first.

7. Promote greater connection between what is needed by teachers and schools and the research community so that research is being done on practical areas and, as such, may have a better chance of being implemented.

8. Seek greater balance and diversity in leadership representative of the stakeholder audiences.
9. **Maintain a strong Advocacy and Public Policy focus.** Be the standards-bearer for the profession. Involve members and build support for taking stands on issues as warranted and disseminate information to stakeholders explaining why certain positions are held.

10. **Review relationships with state organizations and divisions;** eliminate redundancies, and make the organization at all levels cohesive, aligned with a common brand and focus.
Now it is your turn…

- Using the stakeholder recommendations, craft a strategy for each recommendation.
- Select a scribe and reporter
- You have 30 minutes…