

**INTERNAL OPERATION TIMELINE
MO-CASE STRATEGIC PLAN
2008-2010**

Revised Sept. 08
Revised March 09
Revised January 10
Completed June 10

Goal Objective Strategy	Timeline For Completion	Person Responsible	Cost Estimate	Actual Cost	Criteria For Performance	End Results/Date
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Goal I - Leadership: Uphold and direct the future of special education in the state and nation.
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Objective 1 – Recruit and retain highly qualified special education administrators to the profession.
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Strategies						
i. Award and publicize one or more scholarships per year.	Sept/annually	Past- President	\$8000		One or more scholarships awarded at Fall Conference. Award winners publicized on website and newsletter.	Awarded 8@\$1000 9/08 4@\$1,000 9/09
ii. Increase by at least \$7500.00 annually the Charles Cummings Scholarship fund toward permanent endowment that would yield \$5000.00 annually.	June/ Annually	Pres-elect	\$7500		\$7500 or more	6-9-08- \$96,132 6-9-09- \$77,690 12-30-09- \$99,247 5-31-2010-\$96,152
iii. Collaborate with LASE presidents and DESE to develop strategies to retain special education administrators.	Annually/March	LASE Coordinator Mentoring Committee Chair	-0-	-0-	Report to board on activities completed	New Directors Institute- July 2008/July 2009 On-going sessions at fall conference, 12/08 & 12/09 Winter Institute Follow-Up to July New Director's Training Participation on DESE Committee on Mentoring, 08/09 Assumed control of AMP/Mentoring of new special education directors MET- SEE CASE UNIT REPORT
iv. Collaborate with IHE's to recruit and prepare special education administrators.	Fall/ annually	Conf chair PD chair AMP Committee	-0-	-0-	IHE session(s) at conference, explore mentoring	Tim Lewis, IHE Rep. added to Conference Planning Committee

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		Chair				IHE Breakfast at Fall Conference 2008/IHE Session at Fall Conf. 2009 Board members serve as adjunct professors at various universities
v. Award and publicize annually recognition of new outstanding administrator.	Fall/Annually	Past-President	\$150	-0-	New special education administrator awarded	Kim Bielawski- 9-08 Debbie From- 9/09
vi. Award and publicize annually through the Recognition and Distinguished Service Award appreciation for practicing administrators.	Fall/Annually	Past-President	\$300	\$300	MO-CASE Recognition, Distinguished Service Award; Press Release; Newsletter note of accomplishments; website press release	9-08- Terry Allee and Diane Golden- Distinguished Service Award MO-CASE Recognition- Ben Franklin 9-08 9/09- Kim Ratcliffe- Distinguished Service
vii. Collaborate with CEC to recruit potential special education administrators.	Spring/Annually	CEC Board Rep.	Cost of brochures- \$20	-0-	Report to Board on activities completed. (Broader way to collaborate)	Hand-outs at Spring Law Conference, MO-CASE Representative manning and promoting MO-CASE Booth at CEC Conference

Objective 2 – Increase membership and supporter base.						
Strategies						
i. Recognize annually the	Annually	Membership chair &	-0-	-0-	Affiliate(LASE) with greatest % of	Fall Business Meeting- 9/08

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LASE group that has the greatest percentage of MO-CASE supporters. Increasing LASE Membership-Recognizing New LASE Groups and those with increased attendance.		LASE liaison			supporters, recognize @ fall conference & media	Fall Business Meeting 9/09
ii. Recognize annually the LASE group that has the greatest percentage increase of CASE membership.	Annually	Membership chair & LASE liaison	-0-	-0-	Affiliate with greatest % of CASE members, recognize @ fall conference & media	Fall Business Meeting- 9/08 CASE Membership Award 4/09 Fall Business Meeting 9/09
iii. Connect with special education contacts in all Missouri school districts.	Annually	Membership chair	-0-	-0-	Record of contacts and conference evaluations	Contacted all new SPED Directors- 9/08

Objective 3 – Increase member and supporter participation in organizational activities.

Strategies	Timeline	Person Responsible	Cost Estimate	Actual Cost	Criteria For Performance	End Results/Date
i. Recognize participants in conference program, newsletter, website, etc.	Annually	Conference chair/ newsletter chair	-0-	-0-	Documents from year	Conference program 9/08 and 0/09 Recognize volunteers and committees in newsletter.
ii. Provide networking activities for first time conference attendees.	Annually	Conference co-chair	-0-	-0-	Develop conference activities for first time attendees – Fall Conf. networking breakfast for LASE groups	9/08 9/09
iii. Recruit candidates for Board positions and MO-CASE committees who are representative of our membership (geographic,	Annually	President/ Past President and Committee Chairs	-0-	-0-	Record of committee participation & representation- Fall Conference, Planning Committee, LASE Groups, Volunteers, Session Leaders	9/09 Fall Conference Committee and 3/10 LASE Appointments

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urban, rural)						
iv. Conduct two annual business meetings at times/locations designed to encourage membership participation.	Annually	President	-0-	-0-	Attendance at meetings-time has been changed to encourage more participation. Will estimate number of participants.	September 2008 March 2009 September 2009

Objective 4 – Establish organizational structures that address the changing needs of MO-CASE						
Strategies						
i. Maintain and implement a strategic plan.	June/Annually	President/ Exec. Director	-0-	-0-	Results as shown on operation time line	06/07: 2008-10 plan developed Reviewed obj./strategies 6-08 Updated outcomes 3-09 Updated outcomes 6-09 Update/revised 1/10
ii. Develop and implement an annual budget designed to meet the strategic plan objectives.	June/Annually	Board/Treasurer			Implementation, and accounting reports, treasurer reports	06/07 FY 08 and 6/08 FY 09 budget adopted Audit completed 1/09 FY 10 Budget Adopted 6/09
iii. Evaluate staffing and other resources needed to implement the strategic plan	March	Board, Executive Director	-0-		Report/recommendations from Executive Director	1/09 Added paid Advocacy position- Policy Coordinator
iv. Maintain current and accurate member records and communication vehicles.	January/Annually	Membership Chair/Admin Asst	-0-		Data base, newsletter, Director briefs, website	Current data base on file with administrative assistant. List serv of all supporters and all sped contacts available 9/08- Updated each year after Fall Conference
v. Assess and respond to needs of LASE groups and	Ongoing	LASE Coordinator/	-0-		LASE President's Breakfast, develop additional strategies to encourage	Accurate number of affiliates- 9/08

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other educational organizations through affiliation with MO-CASE.		Membership Chair/Executive Director			affiliation. Email Board updates to LASE Presidents after each board meeting. Letter to LASE Presidents from Executive Director and LASE Coordinator Maintain CEC Liaison position on MO-CASE Board LASE Representatives	Board members attend LASE meetings, serve at registration or as session leaders, legislative updates are given, legislative network established, keep current on website,
vi. Maintain an operating budget balance equal to 100% of the annual operating budget.	-Annually by January	Board/Executive Director	-0	-0-	(assets – CC funds) / operating budget	6/08: 133% 12/08 Review of financials 1/09 Audit 6/09: 135% 6/10- 156%
vii. Establish a restricted budget fund to fund the lease of office space and expenses.	January 2010	Board/Executive Director	-0--	-0-	Financial reports	Cost to be determined

Goal II – Advance MO-CASE member policy interests at the state and federal levels.						
Objective 1 – Identify and inform members about key policy issues that affect special education.						
Strategies						
i. Actively participate with other education organizations such as SEAC and MCSA, CASE	Annually	Legislative chair Advocacy Rep Policy Coordinator	\$4000 \$5000	\$4000 \$5000	Report of activities via board meetings, email and <i>The Director</i>	06/08-6 Board members + Executive Director on SEAC Advocacy Rep on MCSA council + \$5,000 contribution 6/09 –Same

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						1/09-6/09- SAC Meeting: Participation every Monday during session.
ii. Monitor legislative activities at the state and federal levels.	Annually	Advocacy Rep Policy Coordinator			Evaluation by the Executive Director/ Policy Coordinator	6/09- See Unit Report 6/09- Web update summary 7/09- CASE Leadership DC 12/09-5/10-Ongoing review of state legislation 6/10--See Unit Report
iii Regularly inform the Board and members of issues of importance through the web site and other communication vehicles, including weekly updates during the MO session.	As needed	Legislative chair Advocacy Rep			Evaluation by the Executive Director/ Policy Coordinator	Spring 09 Legislation session updates to Board and LASE Legislative Network 12/09-5/10- Multiple communications every week on state legislative issues
iv. Solicit input from individual special education administrators and/or MO-CASE affiliates on special education issues.	As needed	Legislative chair Advocacy Rep			Documentation on inquiries, consider developing a list serve for members	Spring 09 Advocacy Rep has continually asked for input during session, established a Legislative Network 12/09-5-10- Ongoing request for feedback on state legislative issues.

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Objective 2 – Advocate for organizational policy recommendations.						
Strategies						
i. Encourage DESE participation at MO-CASE Board meetings and other activities.	In conjunction w/ MO CASE activities	President/Executive Director			DESE participation	6/08 0Asst. Commissioner or SPED Supervisor attendance at all Board Meetings, Fall Conference, Winter Institute 6/09 1/10 Board Meetings 9/09- Asst. Comm. At Fall Conference DESE Sessions at each Fall Conference and Winter Institute
ii. Encourage MO-CASE participation on key DESE committees.	Annually	President			MO CASE participation	6/08: SEAP, ePEGS, New SPED Directors; Mentoring, Blind Task Force; Electronic IEP; MIM; HQT; MITT; DMH Transformation 6/09-1/10- MO-CASE Members serving on the following DESE Committees: Budget Review; MAGI; MIM Advisory; MITT; New Directors; SEAP, State Wide Electronic IEP; Seclusion and Restraint
iii. Establish an advisory relationship with the Division of Special Education within the DESE.	Annually	President			Establish Advisory relationship	6/08: Met 6/09: Met 6/10: Met
iv. Develop organizational position statements on key	As needed	Legislative Chair	TBD		Positions communicated	6/08: Sound System Criteria; Voucher Bills; MoVIP Rules;

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issues.						Vision Bill Rules; NCLB; IDEA regulations Fall 09- OCR Data Comments; Open Enrollment position; seclusion/restraint draft policy
v. Utilize a variety of communications to seek support for organizational positions.	As needed	Advocacy Rep Executive Director President			List of communication strategies used	Contacts, input from LASE Board and Advocacy Network communications plus SAC participation
vi. Provide organizational recommendations to policy makers.	On-going	Legislative Chair			Testimony, Written recommendation, Direct Contacts	Direct contacts, DC Fall 09-Testimony provided Autism Hearings; Open Enrollment hearings
vii. Ensure that lobbying activities remain consistent with the 501 (c) (3) state of MO-CASE	Annually	Advocacy Rep Executive Director Treasurer			<15% of operating budget	6/08 Met 6/09 Met 6/10 Met
viii. Conduct an annual leadership seminar.	Annually	Ex. Director, PD Chair, Advocacy Rep, Legislative Chair	TBD		Seminar to be conducted	Part I Advocacy Training conducted 10/09
ix. Contract to obtain professional advocacy services	By Nov. 1	Ex. Dir. and Board	\$27,500		Contract completed.	1/09

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Goal III –Support: Provide services and resources to special education administrators
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Objective 1 – Connect special education administrators in meaningful mentoring relationships through LASE groups.
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i. Collaborate with LASE Groups to provide mentoring to new special education administrators.	On going	LASE Coordinator LASE Reps AMP Chair	0	0	Identify who needs a mentor in each LASE Group by sending a request to the LASE President to survey their membership. Encourage each LASE Group to increase their individual LASE mentor list by 1 annually. Request that the LASE President send a copy of the agenda as well as the list of individuals who need a mentor to the LASE Coordinator. Obtain an updated list from DESE to see if additional mentors had been added and to make sure they were assigned to a mentee.	8/07: Board report to LASE presidents after each board meeting. 6-09: Ex. Director to explore the possibility of MO-CASE being the facilitating organization for mentoring new Special Education Directors through the AMP Program 8/09: DESE authorizes MO-CASE to manage AMP SEE UNIT REPORT
ii. Collaborate with DESE to develop post-conference workshops in conjunction with the Fall Conference and Winter Institutes for new	Fall Conference Winter Institute	Conference & Program Chairs LASE Coordinator and LASE Reps	0	0	Post conference workshops will be offered at the Fall, Winter and Spring Conferences.	9/08 Fall Conference Program, 12/08 Winter Institute, Fall 2008 Breakfast for New Directors, Spring 2009 Webinar, Participation on

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directors as a follow-up to DESE's summer workshop.						Planning Committee for New Director's Training 9/09 Fall Conference 12/09 Winter Institute April 2010 Webinar
Objective 2 – Distribute relevant information and resources to the membership.						
Strategies						
i. Provide MO-CASE affiliates with state-wide directory of MO-CASE supporters email, address, phone number, etc.	June 2009	Administrative Assistant/ Membership Chair	TBD	TBD	Update the directory list annually in conjunction with the fall conference (obtain from supporter fees list)	Updated 9/08 Determined not to be appropriate-will delete for 2010-2012
ii. Survey districts regarding needs.	On-going	Exec. Dir./ President Administrative Asst.	TBD	TBD	Survey results from Fall conference, Winter Institute and Spring Law Conference	9/08 12/08 3/09 9/09 12/09
iii. Notify members of access to CASE updates on-line.	On-going	Ex. Director	0	0	Email notification by October 1 st of each year, directions on web-site and information in newsletter	Not yet completed 08/09- Met
iv. Dissemination of board information and updated guidance regarding relevant information, including Board updates to LASE Presidents for distribution to LASE members a minimum of four times annually.	On-going	Ex. Director/ LASE Coordinator	0	0	Dissemination of Board Information	Report sent: 8/07, 6/08, 9/08 After each Board Meeting: 9/09;1/10
v. Publish a minimum of 5	Annually	Newsletter Editor,	\$8500	\$8500	Completion of Quarterly newsletters	07-08 6 hard copy editions and

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newsletters per year that relate to those needs identified by members.		Admin. Asst., Executive Director, Advocacy Rep.				1 electronic e-brief 08-09 5 hard copy editions and 2 electronic briefs 09/10- Electronic Brief: 3/09 & 7/09 Newsletters: 12/09; 3/10
vi. Maintain website with information relevant to members.	On-going	Ex. Director/ Admin. Assistant Advocacy Rep	\$600	\$600	The Board will annually review the website at the June Board Meeting: Board Report will reflect changes, etc.	June 2009 –Information is updated and monitored June 2010- Website Review

Goal IV – Education: Provide ongoing support to meet the informational and educational needs of MO-CASE members and supporters.						
Objective 1 – Implement an annual plan outlining needs identified by MO-CASE members and supporters related to professional development.						
Strategies						
i. A Professional Development Planning Committee is appointed-including key board members responsible for all professional development activities.	Annually	PD Chair President Elect	\$200		Committee Appointed	3/09 Beth Emmendorfer appointed as Professional Development Chair Conference Committee Meetings: 9/09 1/10 3/10 6/10 Shantel Farnan appointed as PD Chair 6-10
ii. Professional Development Committee reviews all available data sources, including conference evaluations, member surveys, new legislative requirements, SPP outcomes and LASE/Board feedback.	October of each year	PD Chair President Elect	\$400		Summary of Results, suggestions from conference evaluations, member survey	9/08 Fall Conference Survey 9/09 Fall Conference Survey 12/09 Winter Institute Evaluation-Board/ Conference Committee Review

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iii. Professional Development Committee identifies key priorities for the upcoming year and matches those priorities with the organizational structures for professional development.	June of each year October Transition Meeting	PD Chair President Elect	-0-		PD aligned to strategic plan	12/08 discussions- committee convened 6/09 12/09 Committee Meeting
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Objective 2 – Provide high quality professional development opportunities for members and supporters.						
Strategies						
i. Provide a minimum of three conferences per year that relate to those needs as identified by members.	Annually	PD Chair, President Elect, PD Committee	Determined annually	Determined annually	Evaluation Forms, Conf. Summary	3/08 3/09 3/10 Spring Law 9/08 9/09 Fall Conference 12/08 12/09 Winter Institute Autism & RTI 10/09 Legislative Training (LASE REPS)
ii. Develop methods to gain feedback on the success of the organization's professional development strategies	Annually	PD Chair and Committee	-0-	-0-	Summary of Results, suggestions from conference evaluations, member survey	Evaluation upon completion of all conferences Spring Law-3/09 3/10 Fall Conference- 9/08 9/09 Winter Institute- 12/08 12/09
iii. Investigate and explore other professional development activities.	On-going	PD Committee	TBD		PD Committee report of activities AMP program designed for special education administrators	July 08- July 09 - New Director's Institute -Rich Simpson videos coordinated through DESE and LASE groups Mentors

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iv. Participate in national CASE Board meetings and conferences.	Annually	Executive Director, President, President-Elect Board Members at the digression of President	\$6000	\$6000	Report to Board	4-08 Spring Board Meeting and National CEC Conference 11-08 Fall Board Meeting and CASE Conference 4-09 CASE Spring Board Meeting and National CEC Conference 6-09- CASE Legislative Conference in DC 11/09 CASE Board Meeting Advocacy Training-New Directors
v. Present a model Missouri program at a national CASE conference as appropriate.	Annually	PD Chair and Committee	\$4000	\$4000	Report to Board	Proposal submitted for 11/09 Conference- not accepted

Objective 3 – Collaborate with other organizations providing educational opportunities for special education administrators through yearly contact.						
Strategies						
i. Contact other educational organizations sharing both MO-CASE priorities and current issues in the field.	On-going	Board, Executive Director, Advocacy Rep., President	500.00		Summary of activities	9/08 MO Association of School Psychologists
ii. Contact will be made to other educational	On-going	Board, Executive Director, Advocacy			Summary of activities Newsletter to other organizations	Phyllis Wolfram presenting at MAESP Conference 3/10

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organizations suggesting both presentations and articles that can be disseminated by MO-CASE members to their memberships.		Rep, President Professional Development Chair			Presenting at other conferences What's New in Special Education Powerpoint	