

Final Report

CASE Task Force on the Design for the Future



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President Steve Milliken, NE

Fred Weintraub, CA, Chair
Sue Gamm, IL
Dr. Brenda L. Heiman, LA
Scott Hubble, MI
Dr. Steve Kukic, CO

Phyllis Wolfram, MO
Dr. Luann Purcell, GA Ex Officio

The CASE Task Force on Design for the Future is pleased to submit the following report for consideration by the CASE governance. We are proud to be members of an organization that is vibrant and thus willing from time to time ask the question where it needs to go in the future. Our task was to offer recommendations designed to make CASE the premier organization that benefits and supports administrators charged with oversight, development, implementation and support of programs and services for students with disabilities. It is our belief that CASE is that premier organization and thus our recommendations are designed to improve the organizations effectiveness.

Our recommendations are based on the following premises:

- Meeting the needs and representing the interests of special education administrators is the key to membership growth and stability.
- CASE units are the primary means of meeting member needs
- Developing and supporting CASE units is an essential role of the international organization
- CASE's governance, policies and activities should be reflective of the units and their members.
- CASE needs to act in a manner and style consistent with it being the premier organization representing special education administrators
- CASE needs to maximize its resources to serve its members and advance the organization

The Task Force recognized that a precipitating issue is CASE's relationship with the Council for Exceptional Children (CEC). Specifically, should CASE continue being a division of CEC? We decided to first determine the actions that CASE should undertake to advance the organization and then assess whether the relationship with CEC impedes the attainment of those actions. We have reached the following conclusions:

- The actions we are recommending, particularly in marketing and recruiting members, should not be impeded by CASE being a division of CEC. If they are then CASE should reconsider its relationship to CEC.
- An examination of states and provinces with high CASE memberships is more a reflection of the strength of the unit rather than the cost of membership.
- Membership in CASE will grow when potential members value membership in CASE.
- Survey data indicates that CASE members highly value the benefits they get from CEC membership.
- Frustrations with CEC policies should be resolvable if CASE were to be more aggressive in influencing the governance of CEC.
- CASE currently does not have the resources to meet the additional services that CEC provides to the administration of the organization and benefits to CASE members. Note: The cost of being a CASE member, currently, is approximately \$160.
- Separating from CEC, at this time, would divert resources and organizational energy that will be needed to implement the actions we have recommended.

We realize that our recommendations are extensive and will require significant change in the way CASE currently operates. We would not expect that they should or could be implemented immediately. We do believe that it is essential that CASE consider and commit itself to the new directions that are being recommended.

New Directions

To enhance CASE's position as the premier organization serving and representing special education administrators, the Task Force is proposing six new directions to guide the organization in the future years.

1. **CASE should focus on the development of effective state/provincial units.** For most special education administrators the CASE unit is the basis of their perceived value of CASE. Where the unit is effective in meeting and representing their needs there is growing and sustained membership. The vast majority of CASE members will never attend national CASE conferences or participate in national activities, but they do and will in their state/province when they are effectively offered. Our recommended actions are based on the belief that a premier organization is bottom up from the member, the unit and finally the international organization. We have proposed changes in the way the leadership is elected, mechanisms to strengthen units and supports that should be provided to units.
2. **CASE should provide pro-active leadership in shaping policies that effect special education.** It is essential that CASE be The Voice of special education administrators. If it is to be The Voice it must: know what the policy positions are that special education administrators want advocated, develop clearly defined messages that communicate effectively with policy makers and resonate well with special education administrators; have access to the knowledge necessary to support the positions and have a Voice at the national and state/provincial level that is capable of delivering the message. Our recommendations are designed to strengthen CASE's Voice.
3. **CASE should become active in the development and mentorship of special education administrators.** The preparation and support of the next generation of special education administrators is essential to the future of the profession and CASE. As the recognized professional association for special education administrators CASE has the responsibility for defining the standards for being part of the profession. We are proposing that CASE become more active in advancing its Knowledge and Skills Base for Special Education Administrators and improving and expanding professional preparation programs that meet CASE standards. Further, CASE should promote special education as a career, encourage individuals to enter the field and mentor and support new special education administrators. Positive identity with a professional association when entering the field is one of the best ways to secure and retain members.
4. **CASE should directly and through its units provide the information and professional development its members need.** Ensuring that CASE members have access to the information, and professional development they require to inform and improve their practice is an essential role for CASE and its units. To

- do it effectively will require greater collaboration between CASE and the units and among units. We have proposed actions to improve the CASE website, reevaluate CASE conferences, and better market CASE products. Note: Actions relating to the units' role in professional development and CASE's support of those efforts can be found in the actions under direction 1.
5. **CASE should be recognized in the education community as The Voice of Local Special Administrators and The Conduit for communicating with them.** CASE and its units need to continue to improve their work with other national and state/provincial organizations, particularly those representing state/provincial and local education administrators. The purpose of such interactions should be to advance CASE's pro-active agendas and to provide the expertise of special education administrators to the other organizations. Further, Case needs to have a unified image that portrays it as The Voice of Local Special Education Administrators and a cadre of members with the knowledge and skills to be that Voice.
 6. **CASE should provide leadership in developing and advancing research based practices in special education that are highly correlated to improved student outcomes.** Because of the limited research base on effective practices on special education administration, CASE should document research based practices in special education administration and set agenda for future research. It should advocate for the agenda to become a priority for agencies funding research. We offer actions to support improved research, its reporting and its translation into practice including the establishment of a Center on Special Education Administration.

In addition to the six new directions cited above we also offer other recommended actions pertaining to the governance of CASE, dues and membership categories.

Actions to Implement the New Directions

1. **CASE should focus on the development of effective state/provincial units.**
 - Revise the by-laws to have the Executive Committee elected by the Board of Directors in order to:
 1. emphasize the importance of the units
 2. provide for a more informed vote
 3. emphasize the importance of the tie between the international organization and the unit
 - Charge the Board of Directors with the development of a strategic plan for building and supporting effective CASE units. The focus of the plan should be on how units can outreach to support local special education administrators and how CASE should support the units.
 - Reconfigure the position of Representative of CASE Units and create a Unit Support Committee (USC) to be chaired by the Representative of the CASE Unit. The purpose of the USC is to recommend policies, programs and activities to support and develop effective units including:

1. developing new units
2. strengthening current units
3. providing for the synergy of sharing across units
4. facilitating regional programs, collaboration and opportunities

The President and Executive Director shall give priority to supporting the work of the Unit Support Committee.

- Eliminate the position of Canadian Representative from the Executive Committee. Each Canadian unit will continue to be represented on the Board of Directors, thus ensuring the same level of support received by all units in CASE.
- CASE should develop on its website a system for units to share their activities and products and network with each other.
- The CASE Membership Committee shall develop sample membership campaigns and materials that units can utilize to promote membership in CASE.
- The CASE Professional Development Committee shall develop packaged professional development activities that can be utilized by units.
- The CASE Professional Development Committee shall facilitate the sharing of unit developed packaged professional development activities.
- The CASE newsletter and website shall have a section on successful unit activities and a calendar of upcoming unit conferences and meetings.
- CASE shall provide at a reasonable cost a webpage for those units that do not have websites.

2. CASE should provide pro-active leadership in shaping policies that effect special education.

- The CASE Policy and Legislation Committee shall develop a process to obtain from the membership/units, on at least a quarterly basis, the critical policy issues of concern to special education administrators at the national, state/provincial and local level and then develop the guidance and actions necessary to effectively address those issues at the local, state/provincial and national levels. The Committee shall facilitate the development of a proactive agenda that looks forward to the near and distant future; including the issues of the next reauthorization of NCLB, IDEA, as well as other national, state/provincial and local issues.
- Position CASE to become recognized by educational institutions, government and media as the primary source of information about special education administration. Inform members and the larger education administration community of the critical special education issues that CASE is addressing.
- Create campaigns that involve special education administrators that reinforce the image that CASE is attending to their needs. Use the campaigns to promote membership, contributions to CASE and attendance at national and unit functions.

- Develop a special education administration policy research capacity so that CASE can provide the research based expertise that policy makers need to make informed decisions. CASE should pursue funding to develop this capacity.
- Secure the lobbying services of an individual or firm to represent the interests of CASE in Washington, DC to help CASE expand its credibility and influence in the policy arena.

3. CASE should become active in the development and mentorship of special education administrators.

- Provide for as much unit involvement as possible in the refinement of the CASE/CEC Knowledge and Skill Base for Special Education Administrators.
- Actively promote the CASE/CEC Knowledge and Skill Base for Special Education Administrators as the foundation for state/provincial certification for special education administrators. Develop a campaign for units to utilize in order to have the standards adopted, implemented and to recognize administrators who meet the standards.
- Develop a process to encourage and support second tier personnel (mid management supervisory personnel), teachers and other professional personnel to enter the special educational administration career field, through activities both at the national and unit level.
- Facilitate development and/or use of Leadership packets/materials developed by the Units
- Promote special education administration as a viable and vibrant career path which can make a positive impact on the education of all students.
- Explore the possibility of job posting on the CASE website
- Work to strengthen and support quality special education administration professional preparation programs including earmarking a percentage of federal special education leadership funds for that purpose and requiring that such funds may only go to programs that meet the CASE/CEC Standards.
- Facilitate the development of mentorship programs at the Unit level.
- Develop a web based support network, in collaboration with units, for novice special education administrators. This network would include chat rooms, access to how to information, and linkage to nearby mentors.

4. CASE should directly and through its units provide the information and professional development its members need.

- Improve the website with an emphasis on meeting the needs of special education administrators. Include a members only section with timely information, links to resources, sample forms and how to information.
- The website shall have well indexed power points for use by units and members. There should be an encouragement for units and members to share presentations they have developed.

- The CASE Professional Development Committee shall reevaluate the purposes and benefits of CASE's conferences so they better reflect market demand and capacity. Conferences should provide personal and professional benefits to attendees and significant financial benefit to CASE.
- Actively solicit proposals designed to meet the needs of special education administrators for submission for presentation at the CEC Convention and CASE conferences. Outstanding presentations at unit conferences are a source to be considered.
- Develop an annual Special Education Administration Strand at the CEC Convention.
- Develop and market, in conjunction with CEC and other appropriate publishers, publications and materials that focus on the knowledge and skills that special education administrator's need and that can be used by special education administrators for staff development. CASE should be compensated for their contribution when developing materials for CEC and other publishers
- Place responsibility for oversight of the Journal with the Publications and Product Development Committee and remove the Editor from the Executive Committee.
- Transition the newsletter to an electronic format, with links embedded in articles that will take the reader to more extensive information.
- Develop a model for research based, highly effective special education administration and promote its adoption. Provide templates for data gathering on key administrative issues, such as staffing, budgeting, etc. Provide a depository for "models" on policy, budgets, class size, and other areas in the area of administering special education services.
- Develop Shared Interest Group list serves for "members only" to facilitate the sharing of ideas and practical items, i.e. policy manuals, budget issues, staffing patterns, etc.
- Facilitate the development of Shared Interest Group list serves at the unit level.

5. CASE should be recognized in the education community as The Voice of Local Special Education Administrators and THE Conduit for communicating with them.

- Develop a network of organizations that share CASE's views relating to education policies that effect local special education administrators.
- Using the proactive vision for future legislation/policy (i.e. next IDEA Reauthorization/NCLB Reauthorization), develop an action plan wherein CASE takes the lead to bring the education community together on key issues related to local special education administration.
- Develop a unified image and public relations campaign that portrays CASE as The Voice of Local Special Education Administrators. If CASE is going to be The Voice, it is essential that it consistently behaves and looks like The Voice.

- Formalize relationships with such organizations as the Urban Special Education Leadership Collaborative, Council of Great City Schools, American Association of School Administrators, Council of Chief State School Officers, Association for Supervision and Curriculum Development, and the National Association of State Directors of Special Education.
- Encourage Units to develop partnerships/collaborations with the state/provincial units of the national organizations listed above.
- Develop a cadre of members from units who have the knowledge and skills to provide CASE representation on national committees/task forces.

6. CASE should provide leadership in developing and advancing research based practices in special education administration that are highly correlated to improved student outcomes.

- Establish a recommended research agenda to identify (by asking local directors through the units to identify the critical questions) and document research based practices in special education administration. This should be a function of the Research Liaison.
- Develop and support activities that will result in collaboration with general education organizations to share research results, especially those that reflect high quality instruction for all students.
- Promote the research agenda, and advocate for it to become a priority of the National Center for Special Educational Research in the Institute of Educational Sciences, and other sources of public and private research.
- Encourage and give recognition to school districts, institutions of higher education and research agencies that conduct or participate in research that implements the research agenda.
- The Journal shall give priority to articles reporting research findings based on the CASE agenda.
- Develop a process to translate research findings into practices that can be implemented in school districts and develop and disseminate the practices.
- In partnership with one or more institutions of higher education and/or research agencies establish a Center on Special Education Administration to provide the leadership and support to implement the above recommendations pertaining to research.

7. Other Actions

- Add to the Executive Committee the position of Vice President. The terms of office for the Vice President, President-elect, President, and Past President shall be limited to one year, making this a four-year commitment (i.e., an annual election of Vice President who moves through the positions of President-Elect, President, and Past President).
- Change the title of the Treasurer to Finance Chair (or other appropriate title) to clarify and emphasize that the position's primary responsibility should be to increase non-dues revenue. The role will include serving as chair of the Finance Committee with members working toward advancement of CASE

through developing non-dues revenue opportunities. This Committee will also serve auditing purposes. The Finance Chair shall work in concert with both the Professional Development Committee and the Publications/Product Review Committee, as both help generate revenue. The Finance Chair will remain an elected position on the Executive Committee serving a three year term.

- To enable the Secretary to more actively participate in meetings of the Executive Committee and Board of Directors, use an alternative means of note-taking such as clerical staff, or electronically record the meetings. Consider moving responsibility for overseeing changes to the Constitution and By-Laws from the Secretary to the Past president.
- Establish a floating dues policy, allowing dues to automatically increase at the rate of inflation. This would prevent the need for large dues increases.
- Review and revise the membership categories and their definitions to eliminate discrepancies. For example, currently there is an Associate Member category listed in the CASE By-Laws, yet there is no such category on the CEC membership form for CASE. Currently the membership description in the By-Laws appears to eliminate retired persons who are not currently employed in another job. The Associate Member position should be eliminated, but the Retired and Student categories should be maintained.
- Ensure CASE's informed and active participation in the CEC Representative Assembly (RA). This is CASE's primary avenue of influencing CEC policy for the betterment of CASE. To do so requires representatives that are knowledgeable about the issues, willing to devote the time to effectively represent CASE and have the skills required for effective advocacy.

History of the CASE Task Force on Design for the Future

At the request of the CASE Board the Task Force was created in January, 05 to recommend how CASE can become the premier organization that benefits and supports administrators charged with oversight, development, implementation and support of programs and services for students with disabilities.

Fred Weintraub was selected as chair and in consultation with President Steve Milliken and Executive Director Luann Purcell five additional members were selected based on their knowledge and experience:

- Sue Gamm
- Brenda Heiman
- Scott Hubble
- Steve Kukic
- Phyllis Wolfram

Executive Director Purcell agreed to serve as an ex-officio member of the Task Force and has facilitated and contributed to the Task Forces' work. The collective membership of the Task Force was representative of the professional diversity of the membership of CASE and brought extensive knowledge and experience to the enterprise. Members had experience as local and state special

education administrators, leadership in CASE at the international and unit level and association leadership and management.

In February the Task Force members agreed to initially explore five questions:

1. What are the professional and practice needs of special education administrators and how can CASE effectively meet those needs?
2. What are the policy issues that special education administrators want to have advocated and how can CASE effectively address those issues?
3. What role should CASE play in the education community representing the needs of special education administrators?
4. What would be required for a significant percentage of special education administrators to become members of CASE and retain their membership?
5. What is required for CASE to be an effectively organized, governed, managed and fiscally stable organization so that it can serve the needs of special education administrators?

Each member was assigned one of the questions with the agreement that they would lead the exploration of the topic.

In April the Task Force met for one day following the CEC convention. At that meeting:

1. A discussion of each question was held, led by the member assigned?
2. A matrix was developed that each question leader would use to further develop the response to the question. This included: premier qualities; current status, disconnect/needed changes; and implications.
3. A time line for completing the work of the Task Force was agreed to.

Following the April meeting Task Force members gathered further information, including a survey of CASE members, tested ideas with each other, CASE members and others and worked on completing the matrices. All matrices were completed and circulated to Task Force members.

The Task Force met by conference call on June 10 to discuss the matrices and reach consensus on overriding directions for CASE to become a premier organization. The tentative directions agreed to were:

1. CASE should focus on the development of effective state/provincial units.
2. CASE should provide pro-active leadership in shaping policies that effect special education.
3. CASE should become active in the development and mentorship of future special education administrators.
4. CASE should directly and through its units provide the information and professional development its members require.

5. CASE should be recognized in the education community as The Voice of Special Education Administrators and The Conduit for communicating with them.
6. CASE should provide leadership in developing and advancing research based practices in special education administration.

The Task Force met in Denver, July 24-26. At the meeting directions and actions were reviewed, revised, and expanded. Agreement was reached on format and style for the report.

Subsequent to the Denver meeting a draft report was prepared and reviewed by members of the Task Force. Based on comments received the report was edited and a final copy prepared and submitted to President Milliken.