



Leadership Institute 2024
PIVOTING IN LEADERSHIP
PASSION. IMPACT. VERSATILITY. OPERATIONAL EXCELLENCE. TEAMWORK.



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Membership Cycle

Chad Rummel, M.Ed, CAE
Brannan Meyers, CAE

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Activating Your Membership

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Categories

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- Pre-service Student (undergraduate or graduate)
- Graduate Student
- Early Career Professional
- Professional
- Paraeducator
- Retired
- Family/Parent Affiliate

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Tiers

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Basic	Full	Premier
Pre-Service Student Members: Liability Insurance		
Resource Library, Quick Takes		
SET Today, Store Discounts, Online Journals		
Communities, Unit Memb, PD/Insurance Discounts		
All Recorded Webinars		
Print Journals		
		All Live Webinars
		Free eBook
		Liability Insurance

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Group Memberships

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- ❑ Minimum of five in same school, district, or university
- ❑ About 20% of CEC membership comes through group memberships
- ❑ "Professional Development Package" – for professionals, includes CEC and a division for each person
- ❑ Student Group – Designed for university departments or student chapters, includes insurance
- ❑ University Classroom Package – Provides students a discount code to get reduced membership. Meant for faculty who use CEC resources/journals instead of a textbook.
- ❑ State Packages – Customized upon request to include membership, PD, books, etc; designed for State Departments, typically created to support Early Career

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Understanding Membership

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Join Renew

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Understanding Membership

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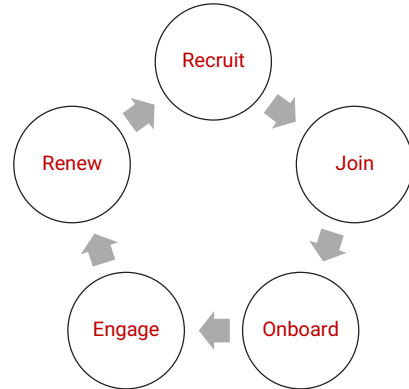
Recruit Join Onboard Engage Renew

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Understanding Membership

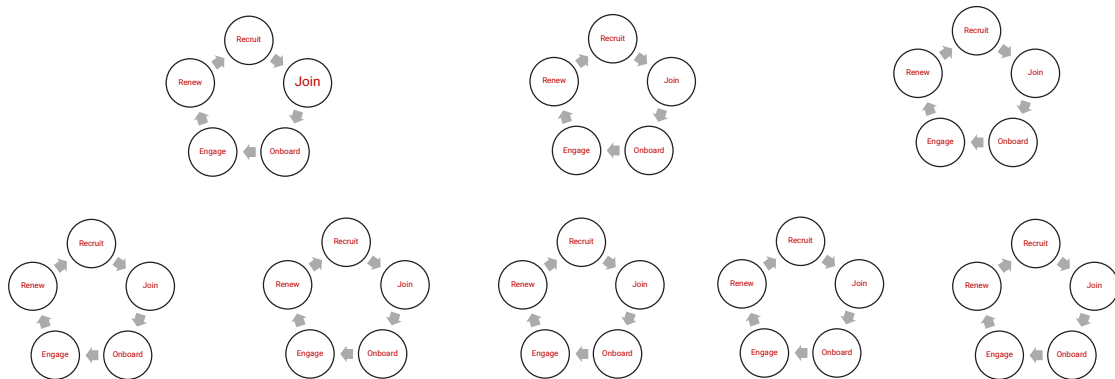
- Pre-service Student
- In-service Student
- Early Career Professional
- Professional
- Paraeducator
- Retired
- Family/Parent Affiliate



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Understanding Membership

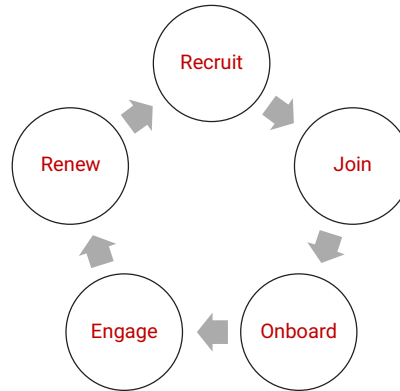


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Which is most important?

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Recruit

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- Membership recruitment is a never-ending project
- Every year members leave your Unit Or Division
 - Retire
 - Change jobs or professions
 - Lose professional development budget
 - Unknown reason
- As members leave, must keep new ones coming in
- To get new members, we need a strategy that address
 - Value to members
 - Who we are targeting
 - What tactics will we use

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Why People Join

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Feature
Journals
Webinars/Events
Resources
All Member Forum



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Why People Join




Feature	Perceived Value
Journals	Free access to research
Webinars/Events	Free access to training
Resources	Free access to tools/support
All Member Forum	Free access to networking




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Why People Join





Perceived Value	Actual Value
Free access to research	Stay abreast on new research and access to practice strategies
Free access to training	Build the skill set you need to be a high performer
Free access to tools/support	Implement new strategies and tools to enhance your job performance
Free access to networking	Learn and grow alongside like-minded colleagues and mentors

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Proposition Value

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- By being in CEC, you will:
 - Stay abreast on new research and access to practice strategies
 - Build the skill set you need to be a high performer
 - Implement new strategies and tools to enhance your job performance
 - Learn and grow alongside like-minded colleagues and mentors

Emotion-Driven

Member-Focused ("You")

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Breakout

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**What strategies have you tried
that worked in recruitment?**

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Joining

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- Managed by CEC (except subdivisions)
- Group Memberships
 - School/District (includes one division)
 - University Student Group
 - University Student Classroom Package
- Events: Using CEC Promo Codes
 - Ask about Membership Reseller Program

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Onboarding

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- The process you have in place to help your **members** acquire the knowledge and skills that they need in order to make the most of their **membership**

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CEC Onboarding

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- **First Impressions Matter**

Anatomy
of a great welcome email

From It's better if your email goes out from an individual

To:

Subject Make your subject line catchy and straight forward

Greetings Try to make it personal. Use first name if possible

Welcome message

Main text
Include a main message that can be one of the following information, setting expectations, providing offers, providing the next steps, learning about the users, product benefits, casual conversation.

Call to action
What next? Provide the next course of action that can be tracked

SIGN OFF

Provide a channel to reach out to the support team

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- Create a “welcome” email series that explains your association and its benefits.
 - Instead of including every possible bit of information in your new member welcome email, create multiple emails your new members will incrementally receive after they sign up.
- These emails can include:
 - Information about your Division/Unit
 - Explanation of Benefits
 - Helpful tips or recent Blogs
 - Anything that adds value for your new members
- Send them to a member center on your website

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Breakout

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Think Of Three Things

- What you currently do and how you get it done
- What do you think is most important to share within your division and/or unit (in early communications)
- What might you do differently this year to work on onboarding

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Who Is Happier with CEC?

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Published in Journal
Serves on CEC Committee
Advises Student Chapter



Attends SELS Each year
No Volunteering
Doesn't Read the Journals

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Engagement Pyramid

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The field
Each other
Your resources
The organization

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Engagement Pyramid

How do members engage with your division or unit?

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Engagement

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- Right People, Right Opportunities
- Listening
- Year-Round Opportunities
- Opportunities at Various Levels of Commitment
 - Microvolunteering
 - Committee Leadership
 - Board Members
- Virtual, In-Person
- Special Interests (Big Pond, Little Fish)
- Role-Specific, not just member type
- Utilizing CEC Resources

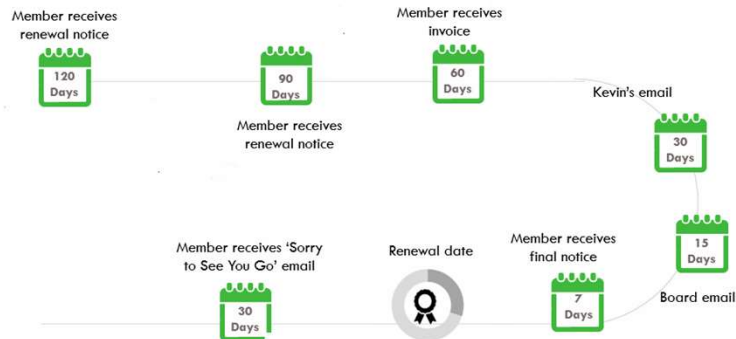
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CEC Renewal

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Renewal

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- More than just a bill
 - Use Proposition Value
 - What's coming up?
 - End of cycle benefits
- "Bob, You Expire Tomorrow"
 - Too late



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Shareout

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Has Anyone Done Anything To Get Renewals that Has gotten a Great Result?

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Questions?

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PROGRAM SHOWCASE

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Teacher Education Division: Onboarding of Leaders

Valentina Contesse
MAL; Membership & Diversity
Teacher Education Division (TED)

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What We Were Trying to Fix:

- TED realized with new Board Members rolling on every year, we needed to do a better job onboarding so our volunteers can hit the ground running
- We also wanted to get more individuals engaged and volunteering with TED so wanted to make the process easier for them to understand
- This filled the need of better organizing our board, supporting our volunteer leaders and keeping our board aware
- We developed this in January 2023

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TED Onboarding
By Tedccc

Overview | Table of Contents | Onboarding PowerPoint | TED Mission/Goals | TED Strategic Plan | TED Bylaws | Financial Policies and Procedures | TED Board Template

TED Onboarding

What Is It?

- Onboarding Webinar in January
 - Right as the year begins, not waiting until our first board meeting in March
- Updated position description
 - Better understanding of what role entails
- Created a repository (Live Binder) that has all necessary information and can always be accessed

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Impact

- Our board members were able to start off with a much better understanding of TED and expectations.
 - Made for an incredibly productive March board meeting and more committees able to hit the ground running
- Benefits our volunteers **AND** helped us to get a larger slate of nominees! **We had our largest slate in years.**
 - The ability for our nominees to better understand what is expected of them when they run, we think helps make them want to volunteers
- We learned to put the date of the onboarding webinar in the materials when we send out acceptances for positions, so everyone is aware early and has it on their calendar

A room for improvement: Next year we want to include the person leaving the role on the call so they can have a breakout with the specific position to offer any questions that may pertain directly to that role

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THANK YOU

- Recommend: More formal onboarding of volunteers. Helps volunteers engage early and feel invested right from the start
- Live binder is a great tool to not only keep your onboarding information organized, but TED uses this for all our board materials.
- This is an additional tool when new members join the board they can easily go back and read minutes/material from all the past board meetings.
- **If you have any questions please don't hesitate to reach out to ted@excpetionalchildren.org**

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Mentoring and Membership to Retain Ohio's Teachers

Taylor Gibbons: President Elect
Erin Loomis: Membership and Mentoring
Committee Chair
John Schwachter: Member-at-Large/Mentee

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New Teacher Institute



- NTI provides support, resources, and networking for early career teachers.
- Beginning cohort 3 in Fall 2024
- Offer free CEC membership along with mentoring from an experienced educator.
- Special educators and general educators were invited to join.

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State Partnership

- CEC Ohio partnered with the Ohio Department of Education and Workforce (ODEW): Office of Exceptional Children.
- ODEW was looking into ways to retain teachers in the state.
- CEC Ohio applied for grant funds to pay for memberships and other related expenses.
- Summer 25: We will be hosting a joint conference with ODEW and other communities of practice (SLPs and School Psychologists).



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Successes & Plans for Future

- All new teachers that participated in the end of year survey for cohort 1 and 2 were returning to teaching!!
- As we start cohort 3 this fall, we are looking to increase our numbers and participation of new teachers.



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Advice

- Create a partnership with your state department of education.
 - Invite them to a unit/division meeting.
 - Ask them to share state updates at a unit/division state conference.
- As you begin the mentoring program process, make sure there are set expectations for both the new teachers and mentors.



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THANK YOU

Scan QR code to see our mentoring website-
<https://tinyurl.com/cecnewteacher>



Feel free to reach out for more guidance!

Taylor Gibbons
President Elect
tgibbons721@gmail.com

Erin Loomis
Membership & Mentoring
Committee Chair
eloomis2795@gmail.com

John Schwachter
Member-at- Large
Mentee 23-24
jschwachter@gmail.com



Culturally Responsive and Sustaining Inclusive Skills in Globally Competent TK-12 Classrooms

Jennifer Ward, Vice President
DISES

Professional Learning Gallery

- Lack of training and resources for educators around the globe
- Aims to increase culturally responsive and sustaining inclusive skills in globally competent TK-12 classrooms.
- Available for special education professionals
- Work in progress

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What is It?

- Online modules
 - Inclusion 101, Family Engagement, Transition into Adulthood, Inclusive Academic Practices, Inclusive Social-Emotional and Behavioral Practices, Assessment, Collaboration, Leadership, Accessibility and Assistive Technology
- Member created
- Biweekly check-ins

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Impact

- Each module provides a video, information brief, activities and resources, DISES community contacts, activities for application
- Increased member engagement and collaboration
- Participants will learn how to contextualize the module topics based on the communities they serve
- Still a work in progress
- Will be available for free

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Wrap

- Allows members to have short-term or long-term involvement
- Addresses a gap in the system on a global level
- Addresses a need expressed by international members

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THANK YOU

Rebekka Jez (DISES President) rjez@sandiego.edu

Jennifer Ward (DISES Vice President) jlward@svsu.edu

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The Power of Collaboration- It's not rocket science!

Anna Adl- Wisconsin CEC Membership Chair
Gianna Marshall- Iowa CEC President/ CAN
Coordinator

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Midwest CEC Connect

- Issue: dwindling leadership and membership in Midwest states; struggling executive boards
- Serving: Midwest/ Central states: Wisconsin, Illinois, Minnesota, North Dakota, South Dakota, Indiana, Iowa, Missouri, Nebraska and Michigan
- Implementation: Quarterly opportunity to connect around Component Performance Matrix

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Midwest Quarterly CEC Connect

- Google meet for Midwest CEC leaders to collaborate and share successes and challenges
- Units who have success share resources, ideas and implementation strategies
- Utilize the Component Performance Matrix as a guide to lead conversations and discuss current goals
- Discussed struggles and possible solutions
- Anna sent out Doodle to coordinate a time and then followed up with a Google Meet link

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Impact

- Low stakes, high reward collaborative
- Come as you are, everyone has a place at the table
- Understanding that we are all volunteers and if you can't make a quarterly meeting, it is okay
- We learned ideas from other units:
 - Examples:
 - Indiana: Fall conference for new teachers
 - Illinois: Fall conference success
 - Iowa: Collaboration for PD with the Scanlan Center for School Mental Health

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Impact

- Adjustments: Starting the meetings with norms to set a positive tone for the meeting
- Opened up opportunities for board members in specific positions across states to collaborate (i.e Treasurer with Treasurer)
- Pointed unit leaders to specific staff that can help them:
 - Indiana- Collaboration with Danielle at state leader meeting
 - Directed Indiana to Sharon Rodriguez for bylaw help
- After the unit breakfast in San Antonio, implemented conversations around the Component Performance Matrix
- We invited Danielle Wieczorek to provide feedback and share resources

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Resources:

- Component Performance Matrix
- Norms
- Doodle
- Google Meet Link
- Used Leadership Institute Directory from 2023 to contact Midwest states

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THANK YOU

- Anna Adl
 - annamarieadl1980@gmail.com
- Gianna Marshall
 - glmarshall@wisc.edu

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BREAK

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COMPONENTS 911

HOW WE CAN HELP

Danielle Wieczorek, Component Services Manager
Brannan Meyers, Director of Component Services

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But first...



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Your Component Services Team:

Chief Engagement Officer:

- **Gennith Johnson**, Team Lead

Director:

- **Brannan Meyers**, Division Support

Managers:

- **Danielle Wiczorek** Unit Support
- **Caroline Schwartz** Chapter Support



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Unit & Division Services Provided by Entire CEC staff

Membership

Communications

Operations

Events

Management

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Continuing Collaboration

- Quarterly Unit Town Halls
- DRC-Initiated Town Halls
- CECCommunities:
 - Division Leadership
 - Unit Leadership
 - CAN Coordinator



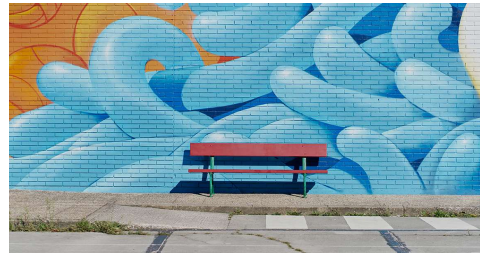
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Building Your Volunteer Bench

- Volunteer Recruitment
- Sample Volunteer Job descriptions
- Submit board updates
 - Quarterly list required!
- Volunteer Square
 - Access the report here →



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Engaging With Your Membership

- Provide promotional discounts to support Unit & Division campaigns
- Leverage our social media, member communication, and volunteer resources and templates

**Pull your membership
reports at any time!**



Scan for Unit
Instructions

Scan for Division
Instructions

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Supporting Communication



- Free website hosting!
 - Including help with updating and design!
- Online communities specific for your Unit & Division
- Reach a broader audience with CEC's help!
 - We will share social media posts when you tag us!
- Utilize our social media accessibility resources

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Assisting with Events

- Registration sites through CEC
- Repackage CEC Programming to utilize as an event opportunity
- List your component's events on CEC's event webpage
- Let us provide you with a Zoom account for your meeting
- Fulfill material requests for conferences and other events
- Ask CEC staff/board members to provide you with a personal, pre-recorded or in-person welcome/greeting
- Utilize CEC's Event Accessibility guidelines

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IDC Grants

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In July 2023, the board approved a proposal from the [Division Relations Committee \(DRC\)](#) for \$20,000 in funding to support a minimum of two grants (up to \$10,000 each) for the 2024 fiscal year. This program is intended to:

- foster collaboration among, and engagement within, divisions to enhance their viability.
- potentially attract and retain members.
- create resources for CEC to share with the entire community to strengthen CEC's ability to support members.

Each funded project must support at least one of CEC's Strategic Plan Goals and Objectives:

- Develop and support an effective and diverse workforce of special education professionals.
- Intentionally embed diversity, equity, inclusivity, and accessibility within CEC.
- Increase the impact of CEC's policy agenda for education professionals and for individuals with disabilities and/or gifts and talents.
- Establish CEC as a globally recognized leader in the field of special education.



Open August 1- October 1

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<https://shorturl.at/0LfAj>

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How is Unit Support Provided?

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- One-on-One support meetings
- Committee meetings
- Board meetings
- Presidential line meetings
- Email
- Town Halls

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Areas of Unit Support

- Revival of Units (Actively working with DC—who is here this weekend!)
- Consultation on the development of chapter structures
- Facilitate membership and engagement programming ideation
- Operations assessment and support
- Review/revise operational documents, including bylaws
- Unit Town Halls
- Volunteer structure and recruitment
- Assistance with goal setting/prioritization

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Component Performance Matrix

Assess your component's performance/compliance in the following areas:

- Strategy
- Operations
- Board Management
- Professional Development
- Programming
- Advocacy
- Communication and Branding
- Member Engagement

Board Management					Notes
	Below Expectations		Meets Expectations		
Term Limits	Term limits are not in place or are outlined in governing document but not followed. <input type="checkbox"/>		Term limits are in place, outlined in governing documents, and are followed. <input type="checkbox"/>		
Elections	Election cycles and eligibility requirements are not outlined in governing documents. <input type="checkbox"/>		Election cycles and eligibility requirements are outlined in governing documents. <input type="checkbox"/>		
Position Descriptions	Unit does not have board member position descriptions outlined. <input type="checkbox"/>		Every board member has a detailed and up-to-date position description and is outlined in governing documents or manuals. <input type="checkbox"/>		
Board Orientation	Unit does not conduct a board member orientation. <input type="checkbox"/>		Unit conducts a board member orientation that includes incoming and outgoing board members. All board members are transitioned by their predecessor and are provided with resources and necessary tools to perform their role. <input type="checkbox"/>		
	Not Demonstrated	Below Expectations	Meets Expectations	Exceeds Expectations	
Volunteer Square	Board members do not/do not know how to use Volunteer Square. <input type="checkbox"/>	Volunteer Square is used inconsistently for soliciting and recruiting volunteers in all volunteer opportunities. <input type="checkbox"/>	Volunteer Square is used for soliciting and recruiting volunteers in all volunteer opportunities. <input type="checkbox"/>	Board members know how to use and promote Volunteer Square on their website. Volunteer Square is used for soliciting and recruiting volunteers in all volunteer opportunities. <input type="checkbox"/>	

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Enhanced Unit Support: Unit Advancement Program (UAP)



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UAP's Primary Areas of Support

- Development of local chapters to overcome physical landscape of state
 - Resources, plans/reports, roll-out process
- Event planning support
 - Logistics, best practices, communication and surveys
- Media and communication
 - Newsletters, event/program promotion, website audit and updates
- Operations
 - Job descriptions, bylaw reviews, election support, resource development, budgeting
- Volunteer recruitment & retention
 - Volunteer pipeline development, board member succession planning/transitions, development of supporting operational documents, identify needs for new roles or committees
- Increase Unit's credibility with members & non-members

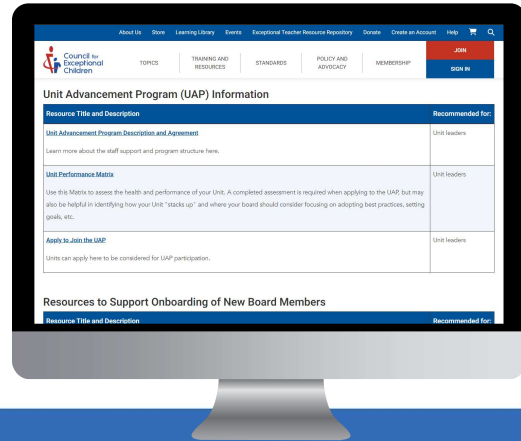
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UAP Resources/Information

- Application link
- Unit Performance Matrix
- Agreement information



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Component Resources



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Component Resources Refresh

◀◀◀ OUT:

- Generic, over-simplified resource categorization
- Outdated resources and resource titles
- Component-type separation of resources

▶▶▶ IN:

- Component-type clarifications
- Resources organization by area of support
- Descriptions for each category of resources
- Updated resource titles for clarity
- Unique resource descriptions
- Recommendations of use for volunteers

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Shared Component Resources

Shared Component Resources Categories:

- Component Fundamentals
- Operational Resources
- Membership and Engagement Resources
- Communication Templates and Resources
- Events and Virtual Programming Resources
- Policy/Advocacy
- Unit/Division Resources *for Supporting Sub-Divisions/Chapters*

Check out the newly updated homepage and access resource pages here:



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What Might This Look Like?

- Create Member Campaign
- Assist in Sending emails
- Detailed analysis
- Membership Strategic Planning
- Membership Surveys
- Manage onboarding of new members
- Meeting Planning
- Event Registration
- Event Marketing
- Communications Marketing Plan
- Graphic Design
- Plan and Launch communications campaign

- Ongoing**
- Administrative support
- Executive leadership
- Project Based**
- Board Training
- Strategic Planning

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Post Assessment

Take before you leave
this room!

I mean it!!!!



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