Welcome to the 2025 Leadership Institute

Council for Exceptional Children





Julie Irene Bost, Ed.D. 2025 CEC President

Thank You to Our Sponsor!



Aaron Brace School Partnership Director Presence

Presence

Empowering all who serve students with diverse needs



The challenge More students qualifying for special education

The solution

A leader in PreK-12 teletherapy







SERVICE GAPS **Clinical network**

2,200+ clinicians with PreK-12 school experience

IMPACT ON STAFF Empowered

More resources, staff feel supported

REACHING STUDENTS More students

Assessments and therapy can be delivered, on time

OUTCOMES

Learning & growth

Move students closer to their potential

IMPACT ON STAFF Stress & burn out Bigger caseloads, staff turnover





Delayed or inconsistent assessments and therapy

OUTCOMES Learning loss Missed opportunities,

unreached goals







THE PROBLEM

Students qualifying for special education increased in the last decade, however...



THE SOLUTION

Partnering with Presence can help your school...



Fill

clinical gaps to end backlogs and help you maintain compliance



Reach

more students and expand service offerings



Relieve

the workload burden for onsite clinical staff and simplify workflows



Empower

students, schools, and parents with appropriate services that are delivered on time

Direct services

Speech-language services & assessments

Occupational therapy services & assessments





A leading provider of customized special education and mental health solutions

Trusted by over **10,000** schools across the U.S. More than **7 million**

sessions delivered

Nearly **285,000**

PreK-12 students serviced

THE PRESENCE PLATFORM

An award-winning teletherapy platform





Riverside Insights



Deliver services in a virtual, interactive platform

Intuitive user experience

Keep student data private— HIPAA and FERPA compliant

The largest library of digital assessments and learning activities from top publishers

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Thank you!

For more information, contact

Aaron Brace School Partnership Director, Presence aaron.brace@presence.com



Lead On: Succession Planning for CEC's Next Generation of Change-Makers

Rodneikka Scott, MSc, CAE, CSM



RODNEIKKA SCOTT MSC, CAE, CSM

Vice President of Member & State Engagement for the National Society of Professional Engineers

Founder & Principal of EmpoweR Consulting, LLC

Expertise in strategic planning, fostering engaging member experiences, and developing impactful programs for professional communities.

Leverages qualifications and leadership to enhance member value and create dynamic environments for professional development.

Dedicated to helping professionals thrive and contribute meaningfully to their fields.



Transforming organizations and empowering future leaders.

THE HEART OF THE MATTER





CORE CHALLENGES IN LEADERSHIP SUCCESSION

LEADERSHIP SUCCESSION REQUIRES HONESTY, COURAGE, AND STEPPING OUTSIDE COMFORT ZONES TO NURTURE AUTHENTIC LEADERS ALIGNED WITH ORGANIZATIONAL VALUES.

Fostering a Culture for Transformational Leadership

EFFECTIVE SUCCESSION REQUIRES MOVING BEYOND TRANSACTIONAL APPROACHES TO CREATE AN INCLUSIVE CULTURE THAT FOSTERS VULNERABILITY AND BOLD TRUTH-TELLING.

"Vulnerability is not weakness; it's our greatest measure of courage." BRENÉ BROWN

Your Vulnerable Truth

Always remember that leadership is a privilege. Your influence can alter the trajectory of people's careers and transform their entire lives.

YOUR VULNERABLE TRUTH (ACTIVITY: THINK-PAIR-SHARE-SCALE UP)

Personal Reflection on Leadership Vulnerability

Participants individually reflect on what makes them feel vulnerable about the future of leadership in CEC.



2



Dynamic Sharing to Build Trust and Collective Insight

Join your assigned group of 5–7 people. Take turns sharing; ensure every voice is heard. SHIFTING MINDSET FROM REPLACEMENT TO GROWTH EMPHASIZING LEADERSHIP DEVELOPMENT

CREATING A CULTURE OF CONTINUOUS LEADERSHIP

3

 Succession planning should move beyond simply replacing individuals and focus on fostering leadership growth and transformation aligned with the organization's mission. Effective succession involves continuously developing leadership capabilities and preparing emerging leaders to embrace the organization's vision and legacy authentically. Succession is a dynamic, ongoing process supported by mentorship and empowerment, cultivating resilient leaders ready to advance the organization's long-term goals

REFRAMING SUCCESSION: IT'S NOT ABOUT FILLING SEATS

"Leaders who don't listen are dangerous."

THE IMPORTANCE OF EMPATHY AND CONNECTION

Building Authentic Relationships

Enhancing Communication and Cohesion

Empathy is essential for effective leadership, requiring genuine efforts to understand and address team members' experiences, fostering trust and mutual respect. Empathetic leadership promotes open dialogue and psychological safety, enabling inclusive cultures that improve collaboration, morale, and sustainable team development.

The Power of Truth-Telling and Disruption



Encouraging Honest Conversations

Effective leadership requires disrupting norms and speaking truth to power to foster growth and remove barriers.



Challenging the Status Quo



Strategic Use of Disruption

Boldness and truthfulness in leadership create inclusive cultures where innovation thrives and outdated practices are questioned.

Leaders use disruption to promote equity and inclusion, combining empathy with candidness to enable transformative change.



- Envisioning Leadership Legacy : Participants collectively explore the desired leadership legacy within CEC, focusing on core values and lasting impact.
- Collaborative Brainstorming Process : Small groups use the World Cafe technique with a Legacy Catalyst facilitating dynamic discussions and idea exchange.
- Rotational Idea Development : Group members rotate tables to build on previous insights, fostering cross-pollination and diverse perspectives.
- Defining Legacy Pillars : Groups identify top three leadership values to guide CEC's future leaders, enabling collective alignment and actionable goals.

The Importance of Recognizing Potential







Identifying Leadership Potential

Leadership potential encompasses traits such as curiosity, resilience, and a growth mindset, indicating the capacity for future leadership roles.

Inclusive and Unbiased Identification

Organizations should use tools like 360-degree feedback and behavioral assessments to avoid bias and recognize diverse leadership styles.

Create Access to the Leadership Pipeline

Embracing varied backgrounds and creating development pathways for underrepresented groups strengthens innovation and organizational resilience.

THE POWER OF TAKING ACTION

The PACE Model in Leadership Development







Transitioning from Planning to Action

Effective leadership development requires moving beyond planning to deliberate implementation, enabling potential leaders to confidently assume roles.

Addressing Leadership Initiative Barriers

Overcoming traditional recruitment limitations and outdated practices involves intentional strategies that broaden talent pools and promote inclusivity.

Creating Clear Leadership Pathways

Establishing transparent and accessible pathways ensures emerging leaders have equitable opportunities to develop and contribute meaningfully.

Leveraging Small Wins for Momentum

Celebrating incremental successes in leadership initiatives fosters motivation, demonstrates impact, and encourages sustained engagement.

Activity: Leadership Spotting Scenario - Gallery Walk

Interactive Leadership Spotting Exercise

Participants engage in a gallery walk with 2-3 posters depicting leadership scenarios. Groups of 5-7 rotate, discussing leadership potential and strategies to empower individuals using sticky notes.





Collaborative Insights and Development Strategies

Groups share observations to identify leadership qualities and actionable ways to support emerging leaders. A large group discussion synthesizes diverse perspectives and effective nurturing approaches.

SUSTAINABLE LEADERSHIP PLANS: BUILDING A "FOREVER THING"

LONG-TERM LEADERSHIP STRATEGY

 Sustainable leadership plans focus on mentorship to connect generations of leaders, fostering continuous support and personalized development for emerging leaders.

EMBEDDING LEADERSHIP DEVELOPMENT

 Leadership growth should be integrated into organizational culture as an ongoing process, ensuring continuous learning and leadership preparedness as a core priority. "I define a leader as anyone who takes responsibility for finding the potential in people and processes, and who has the courage to develop that potential."

"We need more people who are afraid to not do the work."

THE GIFT OF MENTORSHIP

BENEFITS OF MENTORSHIP FOR LEADERS AND MENTEES

 Mentorship fosters professional growth by enabling leaders to develop others' potential while enhancing their own leadership skills through vulnerability, empathy, and creating a supportive environment.

BUILDING AND SUSTAINING MENTORSHIP CULTURE

 Effective mentor-mentee relationships rely on authenticity, trust, and active listening, while organizations must embed mentorship as a core value to ensure continuous leadership development and succession planning.



THE RESPONSIBILITY OF LEADERSHIP

- Accountability and Ethical Leadership : Leadership entails a duty to mentor emerging leaders, foster their growth, and uphold ethical standards to ensure smooth transitions.
- Visionary Leadership with Integrity : Leaders must embody organizational values and lead with integrity, building trust and guiding others toward a shared ethical future.
- Inspiring Through Responsible Actions : True leadership inspires by modeling authenticity, empathy, and commitment to developing others, cultivating a culture of responsibility.

Activity: Mentorship Action Planning – Large-Scale Commitment

Developing Concrete Mentorship Plans **Committing to Mentorship Roles** Creating Support Systems for Sustained Mentorship

Participants identify 1-2 individuals to mentor and reflect on specific small actions they can take within the next month to support their leadership journey.

Participants complete a Commitment Contract, documenting mentees' names, specific action steps, and target dates to ensure accountability and actionable mentorship plans. Participants post their Commitment Contracts on a Wall of Commitment and may share action steps with a buddy to foster community momentum and sustained follow-through. "The future of CEC is not something that happens to us. It's something we create." RODNEIKKA SCOTT, MSC, CAE, CSM

THANK YOU!

Rodneikka Scott, MSC, CAE, CSM Vice President @ NSPE | CAE, Strategic Communications





Grab a Light Refreshment in the foyer, Return by 10:45



Emotion Mood Face Chart




Avoiding Legal and Financial Pitfalls

Chad Rummel, M.Ed, CAE 2025 Leadership Institute









• I worked for a <u>nonprofit that was</u> <u>shuttered</u> by the NY Attorney General in a multi-million dollar lawsuit against the nonprofit, its founders, its vendors AND Board members;



 I have testified in a courtroom following an <u>embezzlement</u> at an association where I worked;



• I have been a plaintiff on a <u>breach of</u> <u>fiduciary responsibility</u> lawsuit against an association Board, ultimately leading to the termination of the Executive Director and Deputy Director—my two bosses at the time;



• While at CEC, I have advised a CEC unit on dealing with an embezzlement, helped a division file Articles of Incorporation, guided a Unit who lost its nonprofit status, and advised a component on the removal of one of its staff members;



•I am a lawyer.







Four Truths and a Lie - Takeaways

- I'm not a lawyer No legal guidance today, just Chadvice;
- I'm clearly bad luck;
- Associations are businesses;
- Regardless of size of your division or unit, laws apply;
- Knowledge is your best safeguard.



Agenda

- Fiduciary Responsibility
- Guiding Documents
- 501c3 and Nonprofits
- Governance Nomenclature
- Conflict of Interest
- Insurance

- License, Tax and Audit
- Accounting
- Contracts



- □ Applies to:
 - Elected Volunteers/Leaders
 - Appointed Volunteers/Leaders
 - Staff

Everyone has the same fiduciary responsibilities

- i.e. president doesn't have more fiduciary responsibility than the membership chair
- Legal implication for not fulfilling responsibilities
 - "Fiduciary Breach"



Responsibility	Chad-Speak	Examples
Duty of Care	Be Informed	Data, Counsel, History COME PREPARED



Responsibility	Chad-Speak	Examples
Duty of Care	Be Informed	Data, Counsel, History COME PREPARED
Duty of Loyalty	Put the Organization First	Avoid Conflict, Declare Conflict



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Duty of Loyalty	Put the Organization First	Avoid Conflict, Declare Conflict
Duty of Obedience	Follow the Rules	Bylaws, Mission, Policies



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Duty of Loyalty	Put the Organization First	Avoid Conflict, Declare Conflict
Duty of Obedience	Follow the Rules	Bylaws, Mission, Policies
Duty of Foresight	Be Proactive	Strategy, Data Mining, Listening



Avoiding Claims of Fiduciary Breach

- Individual volunteers protected somewhat by VPA; not protected from gross negligence
 - Avoid negligence by seeking support/counsel
- Organization NOT protected from negligence
- Remove volunteers members who are negligent; promote volunteers who uphold responsibilities
- Onboard/train new volunteers; make governing documents available



- "Duty of Obedience"
- Follow the laws, policies, and mission of the organization.



Image created using CHatGPT



Document	Created By	Includes
State/ Government Law	Lawmakers	-Who can incorporate -Board responsibilities on voting, quorum, etc



Document	Created By	Includes
State/ Government Law	Lawmakers	-Who can incorporate -Board responsibilities on voting, quorum, etc
Articles of Incorporation	Founders/Board, Filed with Secretary of State	-Mission -Deliverables -Who can belong/support



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Articles of Incorporation	Founders/Board, Filed with Secretary of State	-Mission -Deliverables -Who can belong/support
Bylaws	Board of Directors (Usually Member Approved)	-Membership; -Officers; terms; "Authority" -Standing Committees; Quorum; voting



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Policy Manual	Board of Directors	-Ad Hoc Committees -Guidelines for Operating Outside of the Board Meeting



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Policy Manual	Board of Directors	-Ad Hoc Committees -Guidelines for Operating Outside of the Board Meeting
Operations Manual	Committees; Staff	-Day to Day Operations -Processes and Procedures -Not Legally Binding



Governance Nomenclature



Executive Committee



Governance Nomenclature

- Must use naming structure established in Bylaws
- Names establish authority
- All volunteers have same **Fiduciary** Responsibility; nomenclature defines different **Legal** Responsibility



Governance Nomenclature

		oard		
Presider	nt Past President	President Elect	Treasurer	
Boar MA	_ Board MAL	Board MAL	Board MAL	
Boar MA	L Board MAL	Board MAL	Board MAL	

Chapters SIGS Committees Workgroups Subdivisions









PresidentPast PresidentPresident ElectTreasurerBoar MALBoard MALBoar MALBoard MALBoar MALBoard MALBoard MALBoard MAL		—— Вс	oard —	
	President			Treasurer
Boar MAL Board MAL Board MAL Board MAL	Boar MAL	Board MAL	Boar MAL	Board MAL
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PresidentPast PresidentPresident ElectTreasurerBoar MALBoard MALBoar MALBoard MALBoar MALBoard MALBoard MALBoard MAL		—— Вс	oard —	
	President			Treasurer
Boar MAL Board MAL Board MAL Board MAL	Boar MAL	Board MAL	Boar MAL	Board MAL
	Boar MAL	Board MAL	Board MAL	Board MAL

CommitteesEditorsTask ForcesFoundationStaff



Executive Committee								
	President		Past		President		Treasurer	
	resident		President		Elect		ricubulci	
		Flesident		Elect				
	Board MAL		Board MAL		Board MAL		Board MAL	
	Board MAL		Board MAL		Board MAL		Board MAL	
Committees Edi		tors Task		Forces Foun		dation	Staff	







Insurance

- Anyone involved in the nonprofit organization including directors, officers, employees and volunteers — could be held personally liable for errors or omissions involved in the management of the organization.
- Types of lawsuits:
 - Employment/Contract Issues (90% of nonprofit lawsuits)
 - Fiduciary Duty Breach
 - Misuse of nonprofit funds or donor funds



Insurance

- Directors and Officers Insurance (CEC Can Recommend)
 - Does not cover negligence
- General Liability Insurance
- Event Cancellation Insurance*



Conflict of Interest

- Someone serving in two roles that MAY result in a time when both parties may not be able to be served.
- Not Always Financial
 - Personal Gain vs. Undue Influence
- Should be declared when identified
- Many States Require Nonprofits to Have Written Policy, Signed Annually
- Usually occurs because someone with power has influence (not necessarily control)—sometimes power can be diluted temporarily







Questions to consider

- Does the person with the potential conflict of interest have potential influence that may affect decision-making? Can that power be diluted without a recusal?
- Is there a potential that the person might personally benefit from their own influence OR someone with whom they are closely connected benefit?
- Is there a potential that the person may influence a decision that would have a negative impact on CEC? (or a positive impact?)





CASE STUDY: T-Shirts

- CEC Board Member Jim Millotson owns a T-shirt company;
- CEC prints a lot of teachers to sell at its annual convention;
- Jim offers to print the T-Shirts for CEC at a discounted rate.
- **Option A:** Not let Jim print the T-Shirts;
- Option B: Let Jim print the T-shirts because it will probably save CEC money;
- **Option C:** Have the Board vote and Jim recuses himself from the vote;
- **Option D:** Implement a bid process for printing shirts that doesn't involve the Board of Directors and let Jim bid on the business.


CASE STUDY: Awardee

- CEC Board Member Cindy Gotham is a local administrator and always nominates her students for the Yes I Can program;
- Cindy currently serves as the Board liaison to the YIC committee (no voting power, but there to support the work of the group);
- While on the Board, Cindy asked the YIC committee if she can nominate a student for the awards program;
- **Option A:** Let Cindy nominate her student—there's no money involved;
- **Option B:** Do not let Cindy nominate her student;
- **Option C:** Tell Cindy she can nominate her student only if she first switches to be a liaison to another committee.



501c3 Cans and Cannots

- 29 Different 501c NONPROFIT organizations, all exempt from some federal taxes
 - 501c3 Religious, charity, education, science, etc
 - 501c4 Civic leagues, social welfare, local employee
 - Most Political Action Committees (PAC)
 - 501c5 Labor unions, agricultural organizations
 - 501c6 Business leagues, chamber of commerce
 - Lots of Lobbying



501c3 Cans and Cannots

- No tax on operating income, local sales tax
- Contributions are tax deductible NOT membership
 - Must register to be ACTIVELY pursue donations
- Members cannot engage in activities that utilize nonprofit resources to benefit personally (i.e. book promos)
- Cannot engage in electioneering, supporting any candidate for public office OR allow it to happen in forums, listserves, etc.



501c3 Cans and Cannots

- Cannot engage or create forums for Antitrust violations (propose boycotts of companies, agree on pricing to pay, exclusionary practices, etc)
- CAN do lobbying
 - Safe Harbor Law: Cannot spend more than 20% of first \$500,000 of revenue



Note for 501c6

 Membership collateral MUST state what percent of dues goes to lobbying



CEC Policies

	Divisions	Units
Bylaws	On File with CEC	
Membership	Unified - 1% of CEC (~200)	Unified; 50-Person Minimum
Groups	Oversee Subdivisions	Oversee Chapters
Budget	Should Have One	
Public Statements	Must Use Disclaimer Unless Approved by CEC	Must Be in Alignment with CEC (unless state-level)
Reporting	Submit Annual Assurance Form	
Elections	May support candidates for CEC Board election (new as of 2021)	



Licensure

State Registration

Initial Registration Proves Your "License"

Filed Annually

Update Officers

"Local" Contact

Sometimes include Tax Info

Often includes a payment

Federal Registration

Initial Registration Provides an EIN

Annually File a 990 (T3010 in Canada) Federal Nonprofit Status

Done One Time

KEEP YOUR LETTER



IRS 990

- Form 990 is an annual reporting return that tax-exempt organizations must file with the IRS. It provides information on the filing organization's mission, programs, and finances.
 - All 501c3 organizations must file
 - Revenue <\$50,000 can file 990-N (Postcard)
 - Revenue <\$200,00 can file 990-EZ
 - May be subject to Unrelated Business Income Tax (UBIT)
 - 990 Must be made available upon request
- CEC will not relinquish dues without proof of filing



Accounting Best Practices

- Approve an Annual Budget
 - Review Regularly
 - Look at TRENDS, Not Just This Year (Foresight)
 - Division dues come monthly, Units come annually
 - Diversify Revenue
 - Management vs. Programs
- Multiple "Hands" Involved in Process
 - Minimum = Someone Reviewing Bank Statements
- Rotate Treasurer Role; Audit periodically
- "How Much Should We Have In Reserves?"



Accounting Best Practices

- No money, no mission
- "Business first; family second"



Contracts

• GET IT IN WRITING

"No, Jimmy, I distinctly said you could HALVE your allowance by mowing the lawn."





Contracts

• GET IT IN WRITING

- Anything involving money, Speaker contracts, Web development, Meeting/Event contracts, Editors/Publishers, etc
- CEC will provide free, non-legal review of any contract; Legal review should be handled by an attorney in your state or territory



Meetings/Hotels

- Always start with an RFP (CEC can provide sample)
 - Ask for what YOU want, not what they want to give
 - Discounts on Food/Beverage and A/V (20% minimum)
 - Comped Rooms (1:40 Comped at a minimum)
 - Free Upgrades



Meetings/Hotels

- Chad's Must-Haves
 - Attrition/Slippage of 20%+
 - Any revenue minimums and ability to decrease
 - Cancellation Clause
 - Force Majeure Clause
 - Alcohol Responsibility Clause
 - Walk Clause
 - Rate Integrity Clause
 - Resell/Rebook Clause
- If not experienced, use a third party (CEC can recommend)



So....



Emotion Mood Face Chart



Questions

- Feel free to email
- Laurie VanderPloeg
 - lvanderploeg@exceptionalchildren.org





Questions



DIVISIONS

Brannan Meyers, CAE bmeyers@exceptionalchildren.org



UNITS

Will Webber, CAE wwebber@exceptionalchildren.org





Grab Lunch in the foyer Breakouts begin at 1:00



Leadership Institute 2025 Program Showcase

Featuring: Teacher Education Division (TED), Arizona Unit, Kentucky Unit, Michigan Association of Administrators of Special Education (MAASE), Ohio Unit, Michigan Unit, and CEC's Division of Leaders and Legacy (CEC-DLL)



Streamlining Your Division's Communication: TED's Story

Monique Pinczynski, Assistant Professor

Boise State University



About Me













Communications Initiative

- Communication was a common topic in board meetings
- No dedicated communications committee or communication structure
- Partnered with another board member to propose new committee in November 2024
- Ad hoc committee was approved for one year
- Work began right after that
- 7 months in



Our Work

- Assessed communication methods and outputs
 - Wow finding: We have 15 TED affiliated social media accounts
- Managed TED social media accounts and increased posts
- Created a communication guide for the organization
- Recruited committee members
 - Took inventory of every TED website page
 - Worked with membership committee to start a quarterly coffee chat
 - Supported TESE social media



Impact

- Board members/committees know how to use different communication tools
 - Some did not know that many tools existed
- Getting closer to consistent branding hard to reach some SIGs
- Increased social media presence and engagement
- Slowly moving through website updates with support
- Will continue to track engagement on emails, website, social media



Resources at tinyurl.com/TEDCommunication

- 1. TED Communications Committee Proposal
- 2. TED Communications Guidelines/Resources
- 3. TED Website Inventory



High Impact Book Studies for Professional Growth

Presenter: Robyn Daliri, Ed.D. President-Elect, Arizona CEC Contributor: Tracey Antista Membership Chair, Arizona CEC



Book Study Initiative

- Issue:
 - Access to low-cost professional learning across Arizona
- Target Audience:
 - Educators (teachers, related service providers, school psychologists)
- History:
 - First cohort launched over 10 years ago



What It Is:

- Format:
 - 3 sessions (Fall, Spring, Summer)
 - 4 books offered per session
- Each study:
 - Runs for 12 weeks
 - Participants respond to 2-3 discussion questions per week in an online forum
 - Response to a survey after completion automatically generates a certificate for 20 recertification hours



What It Is:

- Book Selection & Facilitation:
 - East Valley CEC selects & facilitates one book
 - AzDEBH selects & facilitates one book
 - AzCEC selects and facilitates two books
- Book Topics:
 - "Hot topics" (behavior, SEL, trauma-informed care, etc.)
 - Titles by national CEC or AzCEC conference speakers
 - Content-aligned by audience (SLPs, administrators, teachers, etc.)



Impact:

- Benefits:
 - Engaged an average of 150 educators across Arizona participate each year
 - Increased engagement across AzCEC regions/divisions
 - Strengthened collaboration among AzCEC/division leaders
 - Created connections between CEC, AzCEC, and national speakers
 - Delivered low-cost, high quality PD in a time & cost-efficient way



Lessons Learned:

- Adjustments:
 - Communication methods & weekly expectations were refined and clarified
 - Shift to using survey + auto-certification tools to streamline participation
 - Book selection is responsive to member feedback & national education trends
- Future Goal:
 - Have the author facilitate a book study session (during our state conference)



Final Wrap-Up:

- Why replicate this?:
 - Easy to implement & facilitate
 - Allows for cross-component collaboration
 - Builds a strong community of practice
 - Increases networking among members
 - Empowers educators with choice and flexibility
 - Minimal costs with maximum professional value



Resources:

- Resources we can share:
 - Book Study Planning Guide (timeline, roles, sample questions)
 - Survey + Certificate Template
 - Sample Promotional Materials (emails, social media, newsletters)
 - Book List Archive

Contact: Tracey Antista at: <u>taantista@gmail.com</u>





New Member Onboarding: *"Making the Most of Your Membership"*

Dr. Merissa Waddey, Misti Carr, & Brittany Rossell



Onboarding Initiative

- Primary membership drive occurs at our annual Kentucky Exceptional Children's Conference
 - Difficulty attracting or retaining members so many were unaware of the many benefits of membership!
 - Need to engage quickly with new members joining at our Conference
- Limited engagement with our awards and mini-grant opportunities each year
- Difficulty recruiting volunteers to serve on the Board
- Launched our *Making the Most of Your Membership* in 2023, after the CEC Convention was in Louisville


Making the Most of Your Membership

• 1-hour virtual Onboarding **Tonight's Agenda** session via Zoom • Led by the KYCEC Introductions Membership Chair & National CEC Site supported by our CAN • Resources Coordinator, Executive Advocacy Secretary, and Board **KY** Divisions members who can attend **KY Mini-Grants KY** Awards Offer PD credit & door prizes



Making the Most of Your Membership

- Email invitations to all members who have joined within the previous 6 months
- Advertise on social media and the KYCEC Community
- Send the Zoom link to those who register via our Google Form
- Host via Zoom and then share the slides, resources, & PD certificate with those who sign in



Onboarding Impact

- Increased engagement with member benefits from those who attend
 - Award nominations
 - Mini-grant applications
 - Emails to Board members
- PD credit & door prizes have increased attendance...but...
- We still need more engagement!



Onboarding Lessons

- Advertise sooner and more often
 - Date & registration available at our Conference and shared often afterward
- Continue dialogue with attendees
 - Reach out via email to check in
 - Personally invite for volunteer opportunities



Contact Information

- <u>kentuckycec@gmail.com</u>
- Merissa.Waddey@grrec.org
- <u>Misti.Carr@covington.kyschools.us</u>
- Brittany.Rossell@hardin.kyschools.us





MAASE Program Showcase: Advancing our Professional Learning Portfolio

Kirsten Myers, MAASE President Tina Lawson, MAASE Vice President Abby Cypher, MAASE Executive Director



MAASE

Why We Initiated This Work

- **Issue:** Inconsistent professional learning across Michigan's special education system and a one size fits all approach. SE Admin can no longer have the capacity to train all of their staff.
- Need: Statewide, scalable, equity-centered PD solutions for all educator levels. A blend of in-person, regional and asynchronous.
- Audience: Special education leaders and aspiring leaders, teachers, paraeducators, building administrators.
- Launched: 2024–25 academic year.
- Intended Outcomes: Build leadership capacity, address training gaps, integrate inclusion and legal best practices, all while allowing for an individualized path.



MAASE

What MAASE Built

- A comprehensive professional learning system with layered offerings:
 - Paraeducator Bootcamp (1,200+ trained)
 - Developing Inclusive Leaders (Cohort-based)
 - MITTIN virtual modules (1000+ participants)
 - Sold-out flagship conferences like Summer Institute and Hot Topics in Law
- Built by MAASE committees and partners (CEC, MEMSPA, MASSP, MASA, ISDs)
- Designed around HLPs, IDEA law, and inclusive practice standards.



Data Driven Learning System Education Enterprise Scorecard



The <u>Education Enterprise Scorecard</u> is a comprehensive evaluation tool designed to assess the strategic, operational, and instructional health of an organization's education portfolio.

The scorecard serves as both an evaluative and strategic planning resource for educationfocused organizations. It breaks down performance into the following domains:

- Education Strategy Assessing alignment with market intelligence, strategic objectives, target audiences, content priorities, pricing, infrastructure, and partnerships.
- 2. **Portfolio Management** Focusing on business planning, evaluation plans, policies, content calendars, learning environments, and use of education technology.
- 3. Learning Design Examining instructional design, competency development, evaluation methods, design processes, and SME support.









SCORECARD

EDUCATION STRATEGY

Council for

A comprehensive education strategy guides all education programs – what you deliver, to whom, how, and with what resources.



InspirEd

www.inspired-ed.com/tracy@inspired-ed.com/www.tracy-king.com

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Data Driven Learning System MAASE's Content Sandbox

The MAASE Content Sandbox is a strategic planning and alignment tool developed to organize, evaluate, and prioritize professional learning content for special education administrators and other educators. It integrates the Michigan Department of Education (MDE) Standards with MAASE's guiding principles and real-world program offerings to:

- Map educational topics to professional standards and learning formats
- Identify gaps in content delivery
- Guide future content development









Children



Data Driven Learning System MAASE's Content Sandbox

Our Why:

- **Strategic Alignment:** To ensure professional learning topics directly support both state standards and MAASE's mission.
- **Transparency & Planning:** To make clear which standards are being addressed through existing programming and which are not.
- **Resource Optimization:** To coordinate across multiple formats and events (e.g., Summer Institute, New Admin Academy, CoPs).
- Member Needs Assessment: To continuously evaluate whether offerings meet the evolving needs of members.







Expanding the MAASE Sandbox

30 years ago:

What we added:

- Summer Institute (annually)
- Tuesday Professional Learning Conference (every other month)
- Developing Leaders (Ed Camp- every other month)
- General Membership Meetings (every other month)
- Monitors Conference
- SLIP Conference
- Communities of Practice

- Paraeducator Training
- Developing Inclusive Leaders
- New Administrator Academy
- High Leverage Practices
- Full Focus- Wellness
- Adaptive Schools
- Al Webinars
- Mentoring
- MITTIN PLCs





Impact: Expanding Statewide Engagement

- Over 30 high-impact professional learning events from Aug 2024–June 2025
- Thousands of participants across Michigan (over 6,000 people)
- Sold Out Events:
 - Summer Institute 821 registrants
 - Hot Topics in Special Education Law 460 registrants
 - Paraeducator Train the Trainer- 385 trainers, 2200 paraeducators trained
- MAASE now has over 1,000 members
 - Participation in some of our leadership programs provided memberships to MAASE
 - We provided over 2,000 paraeducators with CEC memberships





Lessons Learned: Things to Adopt

- Use tools to collect data on yourself.
- People want a personalized experience.
- Use internal expertise.
- Partnerships are important.
- Continuous improvement via NPS, PL evaluations, and strategic retreats.
- Iterated content and delivery: from asynchronous to coaching + sitebased PD.
- Inspired a new MAASE Community platform for ongoing networking and learning.





Next Steps: Personalized Pathways -Learner Personas

Personalized, meaningful learning pathways for members in different roles, career stages, and with varying levels of experience.

Example:

Transition Coordinator

Learning Progression		
Topic Area	Description	Learning Format
Legal Requirements for Transition Planning	Learn about the specific sections of IDEA and MARSE that apply to transition planning as students enter transition age.	Short Course Module
Transition in the IEP	IEP development requires careful planning and consideration for transition activities. The module will provide an overview of key considerations.	Short Course Module
B-13 Monitoring	Compliance monitoring activities occur each spring within all Michigan ISDs. Learn about the requirements, your role, and best practice for supporting transition-level teachers.	MDE-OSE Procedures Review
Education Development Plans (EDPs)	EDPs initiate transition thinking for all students. Learn how to connect the EDP with the IEP and support student interest, while supporting their needs.	Case Study Review
Community Connections	Explore the agencies and organizations within the community that support transition activities. Learn about their roles and how to effectively collaborate.	Video



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New Teacher Institute: Mentoring to Retain Special Educators in Ohio

Erin Loomis: CEC-Ohio Mentoring and Membership Chair Laura Sebastian, MAT, M.Ed: CEC-Ohio CAN Coordinator and Professional Development Chair



New Teacher Institute

- NTI provides support, resources, and networking for early career teachers
- Beginning cohort 4 in Fall 2025
- Offer free CEC membership along with one-on-one mentoring from an experienced educator
- Scholarships offered to attend national and state conferences
- Special educators and general educators were invited to join



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 hosted Communities of Practice with ODEW to share progress and approaches with other organizations including SLPs and School Psychologists



Department of Education & Workforce





Participation and Retention

- 2022-23: 100 mentees; 17 mentors; 13 scholarships to Louisville
- 2023-24: 40 mentees; 21 mentors; 20 scholarships to San Antonio
- 2024-25: 76 mentees; 48 mentors; 25 scholarships to Baltimore





How can you do it?

- Foster partnerships with public entities in your own state
 - Invite them to unit or division meetings
 - Ask for updates to be shared with the organization
 - Consider recording updates to share out with members
- Set clear expectations for everyone involved
- Collect data and ask questions of participants as you go





THANK YOU

Scan QR code to see our mentoring websitehttps://tinyurl.com/cecnewteacher



Feel free to reach out for more guidance!

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Reaching More, Engaging Better: The MCEC Social Media Refresh

Danya Stump



Introduction

 I'm Danya Stump, Vice President of Michigan CEC. I'm excited to share a quick look at how Michigan CEC refreshed our social media presence to better connect with our community, highlight important work in the field of special education, and engage members in meaningful ways.



Alt Text:

Group of adults in blue Michigan CEC shirts outdoors on a grassy area at Michigan State University. Text reads "2024/2025 Board of Directors."



Project/Initiative

- In 2022, we decided that we needed a Social Media "refresh". Our graphics were often copied out of google or some other search engine. They did not convey our mission, or even signify who we were as an organization.
- o Wanted to increase member engagement and communication.
- o We wanted all social media posts to convey our "brand", be recognizable by our membership, and encourage engagement.



What is it?

- We created a "social media system" that allowed us to create branded, recognizable posts.
- o We utilize a social media calendar. It allows the Communication and Membership committee to brainstorm ideas of what we think is important to our membership.
- o EA has a Graphic Design degree, but we did consider hiring a Social Media Intern.
- o It is an ever-evolving system that changes as we learn new things.
- o Also have a social media raffle at our conference.



Sample section of Social Media Calendar

23rd	Family Center Camp Scholarships	the Family Center Camp Scholarship opportunity is open! #MichCEC Families can apply to receive a scholarship for up to \$250. Camps scholarships are not just limited to face to face, virtual camps are considered as well. Funding is limited, so families should apply as soon possible. <u>Family Center Camp Scholarship</u> Questions? Call the Family Phone Line at 800-359-3722
25th	MiDEC Jane Scandary Nominations	Michigan Division for Early Childhood (MiDEC) of the Council for Exceptional Children is excited to announce the 2023 Call for Nominations for the Jane Scandary Award for Excellence in Early Intervention/Early Childhood Special Education. Individuals or organizations may make nominations. Consider who you know that you feel is deserving of recognition for his or her contributions and accomplishments. Now is the time to nominate that person for this prestigious award! See the Awards tab of the MiDEC website at www.michigandec.org for additional information and to download a Nomination Form. Nomination deadline is February 28, 2023.
27th	CEC Student T-shirt Fundraiser	CEC-Student board is hosting a tshirt & sweatshirt fundraiser! These are available in more colors, order by February 5th to get yours in time for our #MichCEC annual conference! Click here to order: https://www.bonfire.com/mcec-s-fundraiser-1/



Impact

- The impact has been two fold. By sharing out through social media, using recognizable branding, we have:
- o More than doubled our membership numbers.
- o We learned that the posts that are recognizable, get more member engagement. Our Reels, stories, and Facebook lives get more engagement for the under thirty members.
- o We have adjusted our types of posts and know that some of our "series" are more popular (parent and sibling spotlights, conference posts, accessible summer posts).



Save the Date!

PREPPING FOR PROGRESS

Adding New Tools to Your Backpack (Toolbox) for the Start of School



August 3-4, 2022

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michigancec Register Today! Registration for All Sessions at the Free Virtual Learning Event from the PROGRESS Center August 3-4, 2022 are available now... more

Alt Text:

Illustration of five diverse children with backpacks facing away, under "Prepping for Progress" event details for school preparation on August 3-4, 2022.





Alt text: Collage of conference attendees and speakers with event details for the 86th Annual Michigan CEC Conference, "Igniting Change Together 2026," in Grand Rapids, MI, February 25-28, 2026.



Final Wrap Up

We found it to be so useful!

I strongly encourage you to develop a consistent social media brand that makes your component easily recognizable to your members.

- A clear, cohesive brand not only boosts engagement but also helps support membership growth especially when you're sharing important updates or calls to action.
- We've created a post template that's available for you to use and adapt as needed!

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Gather & Share

Barb Melnychuk President Elect



CECDLL.org



Introduction

- "Gather & Share" is a versatile concept with many purposes
- DLL is currently using the concept to:
 - Increase engagement/involvement of current members in DLL, including advocacy, leadership and volunteer opportunities
 - Engage/involve/retain the 4000+ new DLL members resulting from the "Free Membership" initiative
 - Remind well-intentioned busy members of important information, deadlines and their need to act/respond


Project/Initiative: "Gather & Share"

- DLL purposefully gathers information from various sources and then shares it with our members in different ways
- Three examples currently in use by DLL:
 - "Shout outs" since April 2024
 - *"Remembering Education Before PL 94-142" since April 2025*
 - Increased focus on "gathering & re-sharing" in newsletters, etc in 2025



Shout outs



- Communications Committee invites selected members to be highlighted in a "Shout out" via personal contact
- ✓ Invited members submit information/photos about themselves (professional/personal), which are put into an appealing format and sent to all members
- ✓ Feature Executive, Board, Committee so members know who we are and may be inspired to volunteer
- ✓ Recently featuring new members to recognize/welcome them and encourage further involvement





Let's meet our fellow Division Members!

In an effort to get to know each other, the **Division** of Leaders and Legacy thought it would be fun to introduce members in an informal way and give them a "Shout out!" for being a DLL member.

You can participate by nominating yourself to be introduced or by nominating another member. Email us at:

<u>CECDivisionofLeadersLegacy@gmail.com</u> with a name and email address and we will take it from there!

And now, give a Shout Out to.....





Remember Education Before PL 94-142



- ✓ "The further backward you look, the further forward you can see." (Winston Churchill)
- ✓ Helps members understand the power of advocacy and the impact CEC's advocacy can have (and has had) on the education of children/youth with special needs
- ✓ DLL Political Advocacy Committee and Communications Committee invite members and their contacts to submit stories about how PL94-142 impacted their professional or personal lives
- ✓ Each week, one story is sent out to members with an invitation to submit more stories
- ✓ Stories/contacts are being collected for future potential purposes



Do you have a story?

Do you remember what education was like for children with disabilities before 1975? Here is a personal memory collected to honor the history that led to the Education for All Handicapped Children Act (PL 94-142). We're gathering stories and memories from that time to preserve history and honor the journey toward inclusion. Please use the link below and send us your



Remembering Education Before PL 94-142





story.

Re-sharing

- ✓ DLL gathers important or interesting information from other sources
 - ✓ CEC
 - ✓ other Divisions
- ✓ Re-shares them with our members "as is" or with additions
 - ✓ CEC Advocacy messages with sample letters that members can use or with additional links
 - ✓ Convention 2026 proposal deadlines and link
- ✓ Inserted into the monthly DLL newsletter
- ✓ Separate message

Impact of "Gather & Share"

- Tracking results show that more recipients open the PL94-142 stories than any other DLL e-mails
- Every time a story is shared, 1-2 more are submitted
- Currently exploring other possible uses for these inspiring and touching stories



Impact of "Gather & Share"

- Shows members that DLL is 'in touch with' and supportive of initiatives/projects/ideas from CEC and/or other components
- Well-intentioned, busy members may benefit from a reminder/nudge to take action





Why might components use the concept of "Gather & Share"?

- Flexibility: can look different depending on component/need/issue
- Increases the value of your component to your current and potential members while contributing to CEC and the field





Questions? Looking for samples?

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Strategy in Action



Round 1 (15 minutes)

- Find a partner or join a trio.
- Discuss the following:
 - What's the most important insight or tool you've gained so far?
 - How could this show up in your leadership starting next week?
 - What will success look like when you apply it?



Round 2 (15 minutes)

- Discuss the following:
 - Here's the idea I want to implement...
 - Here's where I might get stuck...
 - How would you approach this idea?



Strategy Card (5 minutes)

 Complete your Strategy Card 1.What will I implement?
2. When will I do it?
3.What support do I need?



Share Out

• Who's leaving here with a clear first step?



Networking Reception

