



Council for
Exceptional
Children

CEC 2026

**Leadership
Institute**

**Welcome to the 2026
Leadership Institute**

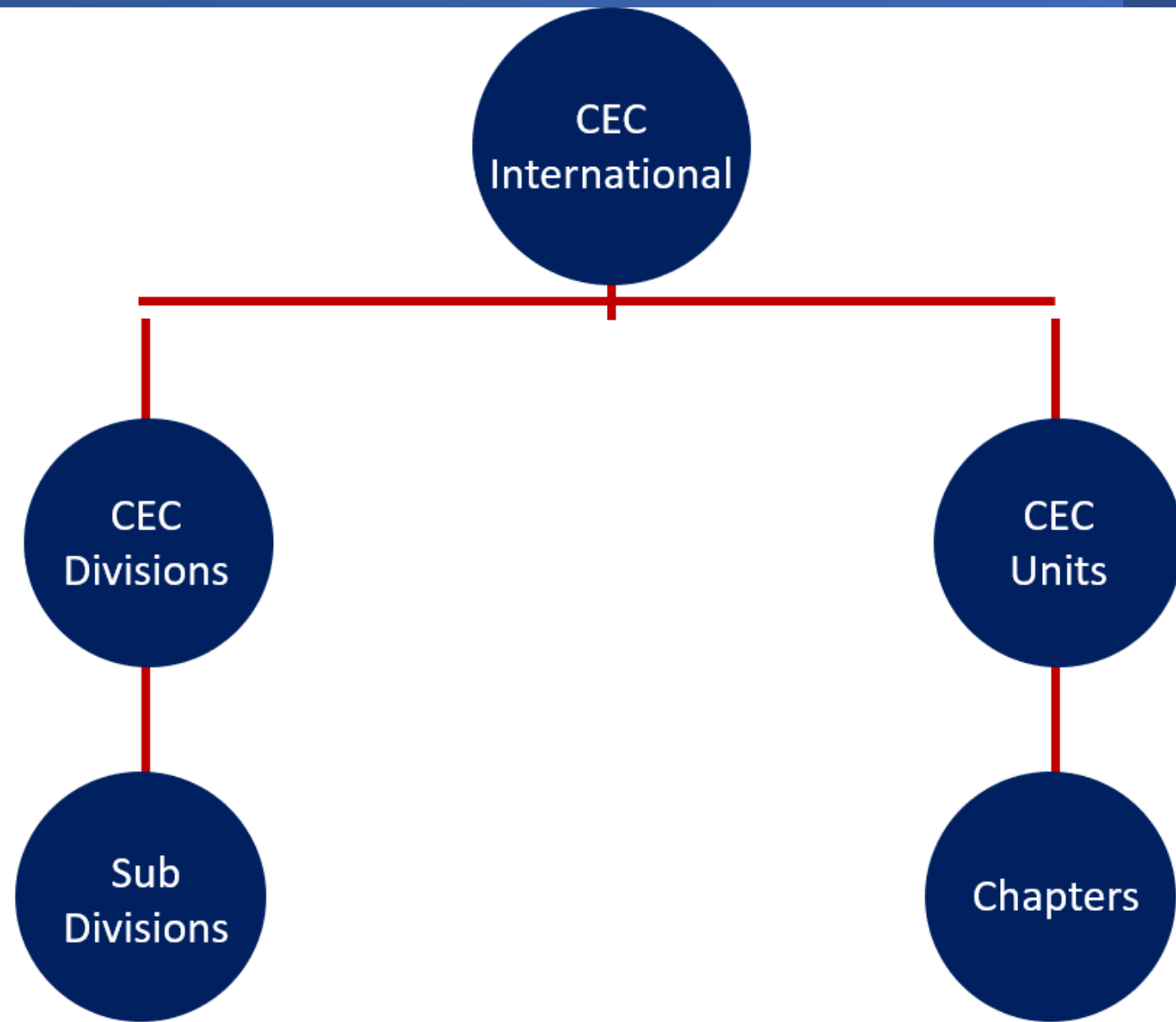


**Benjamin "Ben" Tillotson, M.Ed.
2026 CEC President**



Special
Education
Legislative
Summit









- ☐ Less than 5 Years
- ☐ More than 5 Years
- ☐ More than 10 Years
- ☐ More than 15 Years
- ☐ More than 20 Years



CEC Board of Directors

- **Anna Marie Adl**
Member-at-Large
- **Precios Armstrong**
Member-at-Large
- **Radha Bala**
Member-at-Large
- **Amy Braddock**
Member-at-Large
- **Julie Irene Bost**
Immediate Past President
- **Jennifer A. Diliberto**
Member-at-Large
- **Wendy Gonzales**
Member-at-Large
- **Concetta Lewis**
President-Elect
- **Toni Mixon**
Member-at-Large
- **Adam Moore**
Member-at-Large
- **Wendy Otheim**
Member-at-Large
- **Ruby L. Owiny**
Member-at-Large
- **Mabel Rivera**
Member-at-Large
- **David James Royer**
Treasurer
- **Chad Rummel**
Chief Executive Officer (ex-officio)
- **Zelphine Smith-Dixon**
Member-at-Large
- **Benjamin "Ben" Tillotson**
President

CEC 2026-27 Cohort

Domonique Alexander (AR)

Jamie Heim (WA)

Shalika Robie (TN)

E Renae' Antalan (WA)

Robert Higgins (MI)

Adrienne Seamans (ID)

Ashley Ben-Jacob (DCD)

Sudha Krishnan (DISES)

Riley Seielstad (OH)

Erin Cayer (NH)

Hannah Lowe (OH)

Mikyung Shin (ISET)

Cheyney Cushing (DCDT)

Chelsea Marelle (GA)

Jennifer Smith (DARTS)

Rachel Elliott (WI)

DeVoshia Mason Martin (DADD)

Julie Thompson (TX)

Ruth Eyres (DADD)

Lilliana Mejia (IA)

Sadie Fatollahzadeh (DARTS)

AJ Naatz (ISET)

Celebrate a Legacy of Excellence in Special Education

A Legacy Proclamation is a way to honor the work of exemplary members while inspiring and motivating others within CEC and beyond.



Deadline: September 8, 2026

**Scan the QR code to submit your nomination or visit:
exceptionalchildren.org/awards/cec-legacy-proclamation**



Thank You to Our Sponsors!





**Gennith Johnson, MCD,
CCC-SLP, CAE
Chief Engagement Officer**

**Brannan Meyers, CAE
Director of Component
Services**

**Will Webber, CAE, CVA
Sr Manager, Component
Services**

SCHEDULE-AT-A-GLANCE



CEE 2024
Leadership
Institute

Meet with CEC Staff!

Drop by the Exhibit Hall for one-on-one chats with CEC staff and sponsors. Have an appointment? Head to their table. Need one? Sign up by scanning the QR code!



Visit the CEC Store!

Browse publications and merchandise. Staff are available to assist with pre-orders, recommendations, and discounts.

WEDNESDAY

THURSDAY

FRIDAY

Wi-Fi: MarriottBonvoy_Conference
Password: westinalex

- 1:00 - 1:15 PM
Welcome & Opening Remarks
Brannan Meyers & Gennith Johnson
- 1:15 - 2:05 PM
State of the Council & CEC Structure
Chad Rummel
- 2:05 - 3:05 PM
Fiduciary Responsibilities & Avoiding Legal Pitfalls
Chad Rummel
- 3:05 - 3:10 PM
Remarks from Sensory Room Solutions
Jay Perkins & Carlos Diaz
- 3:10 - 3:20 PM - **BREAK**
- 3:20 - 4:00 PM
Meeting the Moment: Build & Deliver Member Expectations
Chad Rummel & Brannan Meyers
- 4:00 - 5:00 PM
Program Showcase & Action Planning
Brannan Meyers & Will Webber
- 6:00 PM
Group Dinners
Meet Host in Hotel Lobby

- 8:00 - 9:00 AM Breakfast
- 9:05 - 9:10 AM
Remarks from Let's Go Learn
Richard Capone & Angela Bost
- 9:10 - 10:10 AM **KEYNOTE**
Strategic Volunteer Engagement & Management
Nicole R. Smith, CVA
- 10:15 AM - 12:20 PM Breakouts
 - Group A - Whitney
 - Group B - Banneker
 - Group C - Wright
- 12:30 - 1:30 PM Lunch
- 1:30 - 2:00 PM
Running a CEC-Standard Component
Will Webber
- 2:00 - 2:30 PM
Policy at the Local Level
Kuna Tavalin
- 2:30 - 3:20 PM **KEYNOTE**
The Art of Delegation
Nicole R. Smith, CVA
- 3:20 - 3:30 PM - **BREAK**
- 3:30 - 4:30 PM
"Worst Idea" Reverse Brainstorm
Will Webber
- 4:30 - 4:40 PM
Spirit of CEC Award
- 4:45 - 5:45 PM
Networking Reception

- 9:00 - 10:00 AM
Leader Appreciation Breakfast
- 10:00 - 11:00 AM **KEYNOTE**
Visionary Leadership
Nicole R. Smith, CVA
- 11:00 - 11:30 AM
Leader Collaboration: Round Robin Action Planning
Will Webber
- 11:30 AM - 12:00 PM
Debrief & Closing
Gennith Johnson & Brannan Meyers

Thank you to our sponsors:



MEET OUR KEYNOTE SPEAKER

Scan the QR Code to learn more about our Keynote Speaker and her respective sessions!



CEC ACTION PLANNING CALENDAR

Professional Development

Goals:

Jan

Feb

Mar

Promote CEC Convention
(Regular Reg. Ends)

CEC Annual Convention

Annual Convention Schedule
Published
SELS



GOAL

PLAN

ACTION

- **\$20K Idea**
- **Non-Dues Revenue Ideas**
- **Ways You've Grown Membership**
- **Tips for Board Cohesiveness**
- **DEIA Initiatives**

GETTING TO KNOW CEC **&** **STATE OF THE COUNCIL**

Chad Rummel, M.Ed., CAE
Chief Executive Officer

Getting to Know CEC

- Getting to Know CEC
 - Umbrella Organization
 - CEC by the Numbers
 - Hierarchy/Governance
 - Policy Structure
 - Staff
- State of the Council
 - Membership
 - Division/Unit Membership
 - Finances
 - Strategic Plan
 - New Initiatives



“Umbrella Organization”

- Association designed to cover large fields where activities may occur in silos without full support of field
- Allows for coordinated activities; sharing of resources
- Provides identity, brand to smaller organizations



Units	Local Chapters	Student Chapters	Divisions	Subdivisions	Affinity Groups
-------	----------------	------------------	-----------	--------------	-----------------



Units	Local Chapters	Student Chapters	Divisions	Subdivisions	Affinity Groups
-------	----------------	------------------	-----------	--------------	-----------------

- Affiliated through CEC Headquarters
- Based on geography (US State or Canadian Province)
- “Mini” localized versions of CEC
- All separately incorporated, own Boards of Directors
- Join through CEC; members must belong to CEC and Unit both
- Dues are included as part of CEC dues
- 47 State Units, 3 Provincial Units, almost 1 District Unit! (yay)



Units	Local Chapters	Student Chapters	Divisions	Subdivisions	Affinity Groups
-------	----------------	------------------	-----------	--------------	-----------------

- Affiliated through and report to their State/Provincial Unit
- Based on geography (parts of a State/Province)
- “Mini” localized versions of State/Provincial Unit
- Separate governing Boards; may have dues (collected locally)
- Members join a chapter in their member profile at CEC
- Members must also belong to the relevant Unit and CEC
- Hundreds existed at one time



Units	Local Chapters	Student Chapters	Divisions	Subdivisions	Affinity Groups
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- Affiliated through and report to their State/Provincial Unit
- Based on a university/college
- “Mini” versions of State/Provincial Unit
- Separate governing Boards; may have dues (collected locally)
- Members must also belong to relevant Unit and CEC
- Members join a chapter in their member profile at CEC
- Hundreds existed at one time.



Units	Local Chapters	Student Chapters	Divisions	Subdivisions	Affinity Groups
-------	----------------	------------------	-----------	--------------	-----------------

- Affiliated through CEC Headquarters
- Based on professional interests/role, practice setting, or focus in a specific exceptionality
- All separately incorporated, own Boards of Directors
- Join through CEC; members must belong to both CEC and Division(s)
- Additional dues charged at time of joining
- 18 currently exist

- Council of **Administrators** of Special Education (CASE)
- Complex and Chronic Conditions: The Division for Physical, Health and **Multiple Disabilities** (CCC)
- Division of Leaders and **Legacy** (CEC-DLL)
- Division for **Research** (CEC-DR)
- Division of **Evaluation** and **Assessment** for Learning (DEAL)
- Division on **Autism** and Developmental Disabilities (DADD)
- Division of Visual and Performing **Arts** Education (DARTS)
- Division for **Communication**, Language, and Deaf/Hard of Hearing (DCD)
- Division on Career Development and **Transition** (DCDT)
- Division for Culturally and Linguistically **Diverse** Exceptional Learners (DDEL)
- Division for Emotional and **Behavioral** Health (DEBH)
- Division for **Early Childhood** (DEC)
- Division of **International** Special Education and Services (DISES)
- Division for **Learning** Disabilities (DLD)
- Division on **Visual** Impairments and Deafblindness (DVIDB)
- Innovations in Special Education **Technology** Division (ISET)
- The Association for the **Gifted** (TAG)
- **Teacher Education** Division (TED)



Units	Local Chapters	Student Chapters	Divisions	Subdivisions	Affinity Groups
-------	----------------	------------------	-----------	--------------	-----------------

- Affiliated through and report to Special Interest Divisions
- Based on geography (State or Province)
- May be separately incorporated; governed by rules of Division
- Join through Subdivision; membership not tracked by CEC
- Additional dues may be charged at time of joining



- Formerly known as “caucuses”
- Affiliated through CEC Board / HQ
- Based on shared background or interest, not professional role
- Informal networking, connections and mentoring
- Creating and sharing of resources; supporting changes within CEC to support a more diverse membership
- Join through CEC profile
- Seven exist

Current Affinity Groups

- American Indian, Alaska Native, Native Hawaiians
- Asian/Asian American/Pacific Islander
- Black
- Educators and Families of Children with Disabilities
- Educators with Disabilities
- Hispanic/Latino
- LGBTQ+
- Private School Special Education

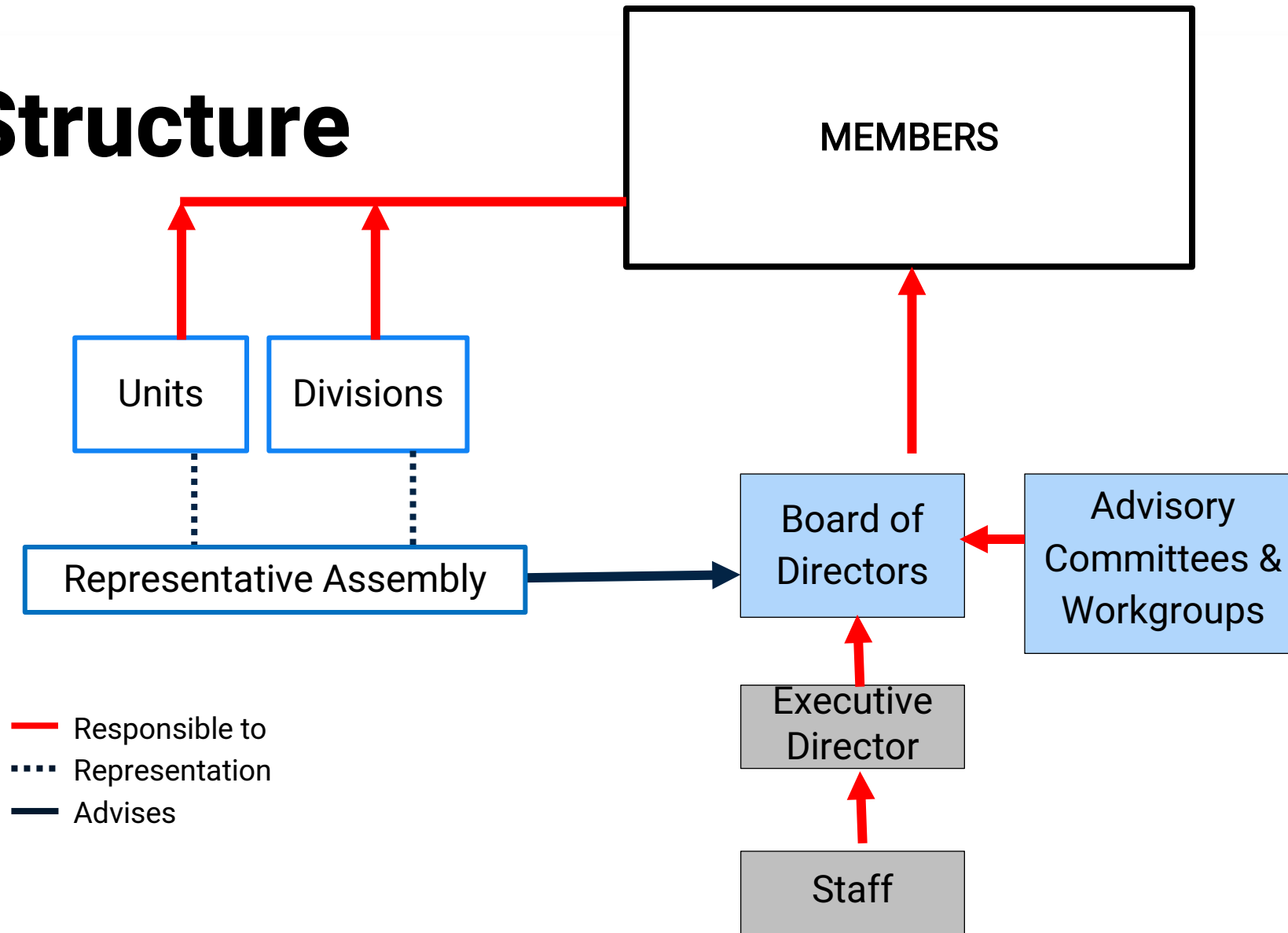
Units	Local Chapters	Student Chapters	Divisions	Subdivisions	Affinity Groups
-------	----------------	------------------	-----------	--------------	-----------------

Do you know which COMPONENT you are representing at the Leadership Institute?

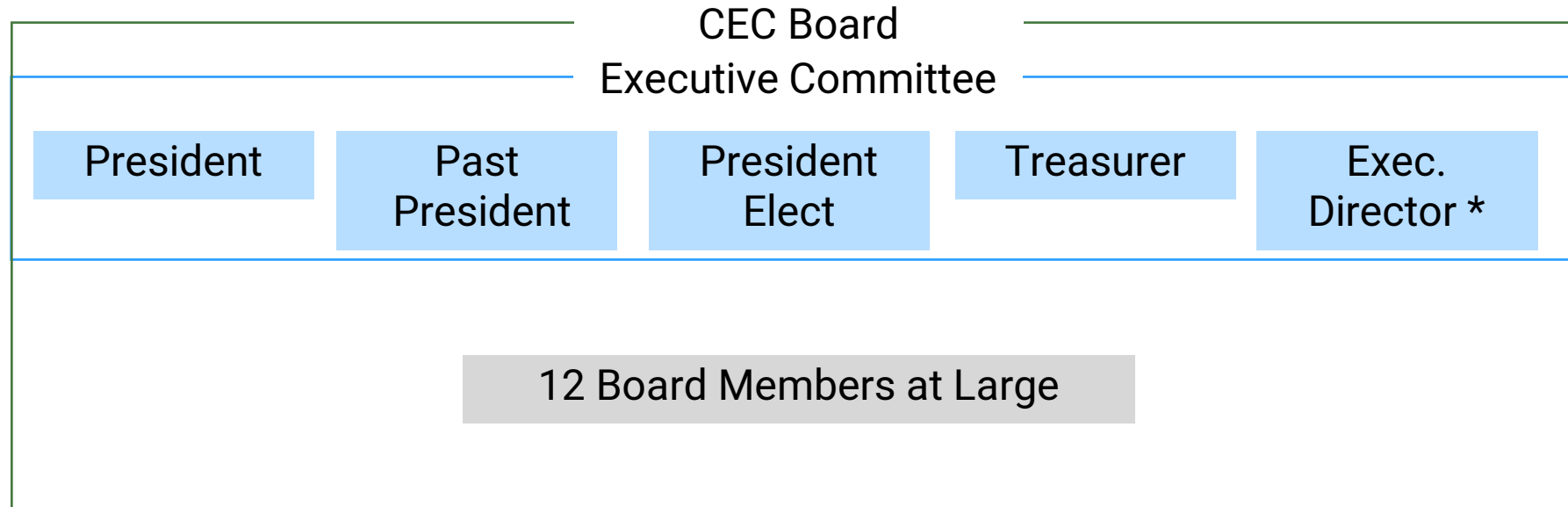
CEC by the Numbers

- 20,000 Members
- 16 Board Members
- 16 Committees
- 38 Staff
- 18 Special Interest Divisions
- 51 Units
- 8 Affinity Groups
- **Thousands of volunteer leaders!**

CEC's Structure



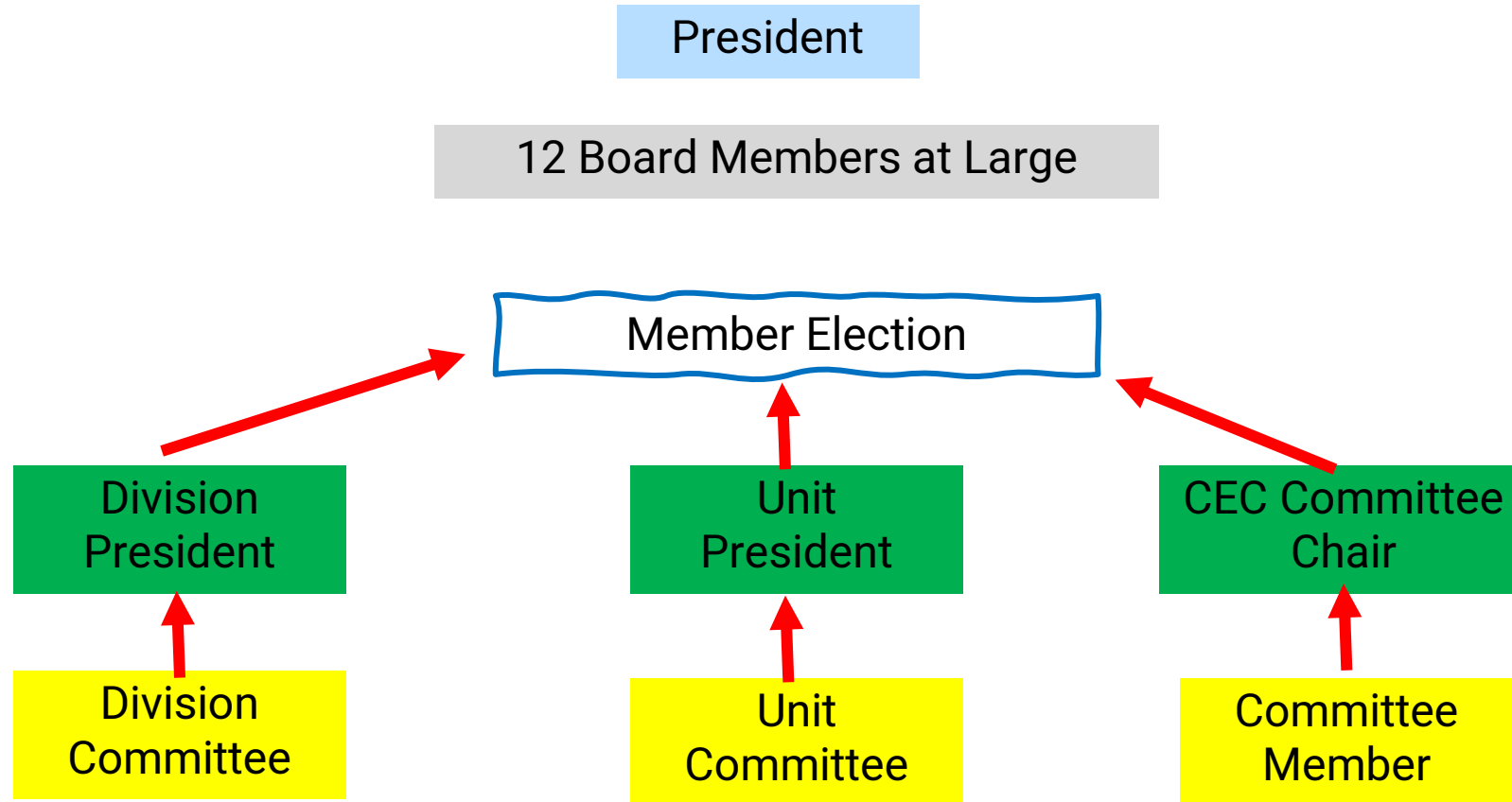
Board Structure



How do recommendations get to the Board?

- Divisions
 - DRC (Division Relations Committee)
- Units
 - CEC Staff
 - Directly to whatever committee it applies to
- Committees
- Always can bring to CEC Staff
- Run for the Board!

Leadership Pipeline



Volunteer Square



"Volunteering has opened me up to the wider world of special education outside of the classroom. In my five years as a CEC member and volunteer, I have learned so much about more about the field, expanded my professional network and career options, and met the most amazing teachers who have helped shaped the work I do today. Because of this, I have a reinvigorated appreciation and love for special education and the exceptional students we serve."

Belkis Choiseul-Praslin

Student and Early Career Committee Member

[Read more from Belkis](#)

Volunteer Square

- Over 536 individuals wanting to get involved
- Many are not members yet, but could be!

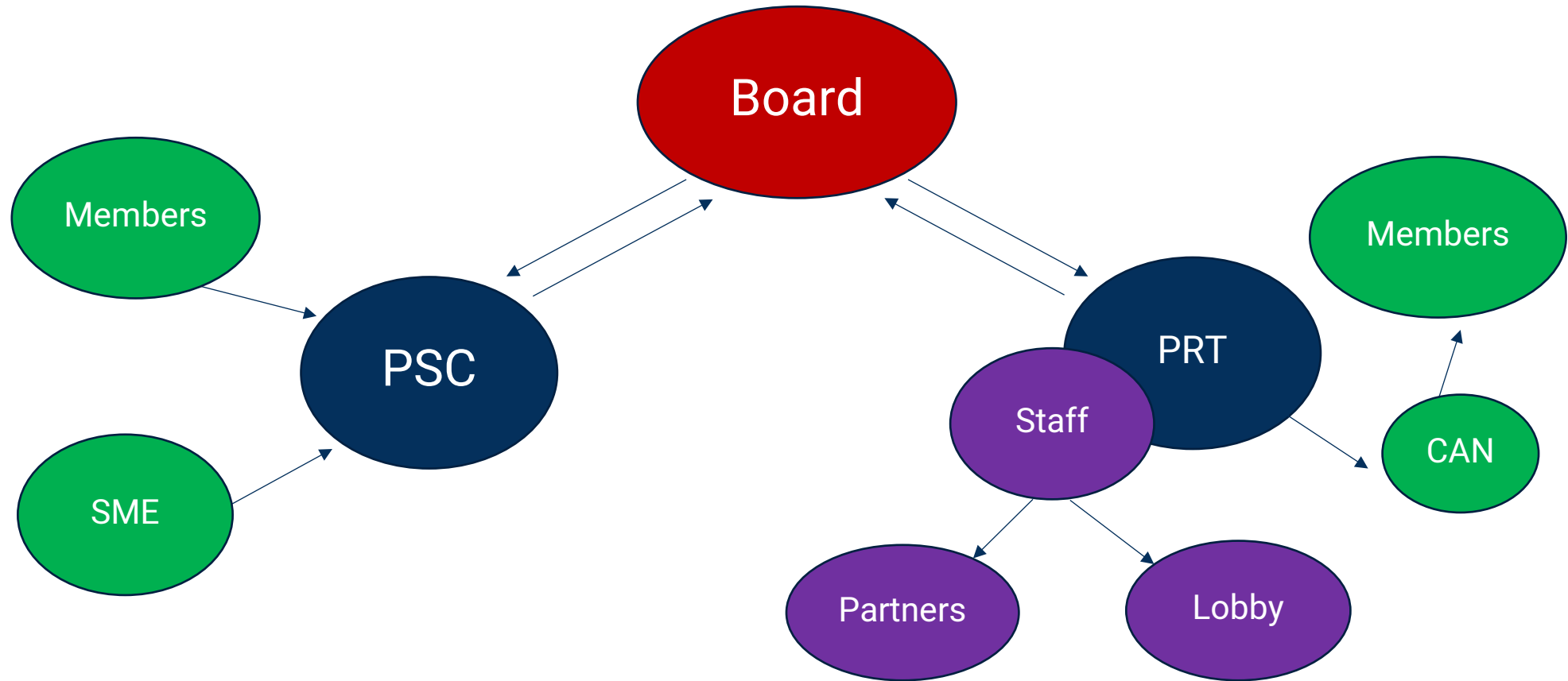
CEC Volunteer Square

This page is ONLY for Division and Unit leaders and should not be shared publicly. Data in this report is only to be used for the purpose of recruiting volunteers to support CEC's volunteer recruitment efforts.

Export the data to see the full data for each volunteer, including why they want to volunteer and what kinds of work they are interested in specifically.

Entries << < 41-50 of 376 > >>							
	Name	Last	Organization/School/University	Select Your Local State/Province	How long have you been employed in education field	Professional Role	Briefly share any volunteer work you have done before (CE...
41	sandy	shacklady-white	Pattan - East	Pennsylvania	12+	Teacher	Honore committee Researc committee PA CEC advisory board PA CASE board Suicide prevention trainer
42	Kalynn	Pistorio	Columbus State University	Georgia	8-11	Higher Education Faculty	Website administrator, conference proposal reviewer for a variety of conferences, conference location proposal reviewer, Holmes Research Coordinator
43	Teresa	Wagner	Miami County Educational Service Center	Ohio	12+	Teacher	* 30 years advocating an local, state, national level for persons with disabilities
44	Linda	Schipman	Bering Strait School District	Alaska	12+	Teacher	Special needs theater director/organizer. Background in media, TV, Theater, and Film.
45	Lisa	Collins	School	Michigan	12+	Other	
46	Elizabeth	McMahan	University of Wyoming	Wyoming	12+	Other	I have volunteered in many capacities and roles in Girl Scouts, Girls on the Run, Special Olympics, Church organizations, and PTA/PTO.
47	Radha	Balasubramaniam	Toyon Elementary	California	12+	Teacher	Den Leader for 4 years in my son's Cub Scouts. Mentor parent or Merit Badge Counselor for my son's Boy Scouts Troop for over 8 years.
48	Megan	Dumond	American University	District of Columbia	4-7	Other	I have held various volunteer leadership roles in student government.
49	Qwaye	Bright	Arizona Department of Corrections	Arizona	12+	Other	I have not done volunteer work, but I really want to.
50	Kinara	Vitha	Florida State University	Florida	0 - Still a Student	Student	Give Kids the World Non-Profit Organization. Worked as a volunteer to support children and families with critical illnesses.
<< < 41-50 of 376 > >>							

Policy Structure



CEC Committees

- Accreditation Commission
- Development/Fundraising Committee
- Diversity
- Division Relations Committee
- Finance & Audit Standing Committee
- Honors Committee
- Leadership Development Committee
 - Leadership Development Program Subcommittee
- Local Arrangements Committee (Convention)
- Policy Response Team
- Policy Steering Committee
- Professional Practice and Standards Committee
 - Knowledge and Skills Subcommittee
- Program Advisory Committee (Convention)
- Publications Committee
- Special Education Legislative Summit Planning Committee
- Student & Early Career Committee
- Yes I Can Committee

PROFESSIONAL AFFAIRS

PUBLIC AFFAIRS

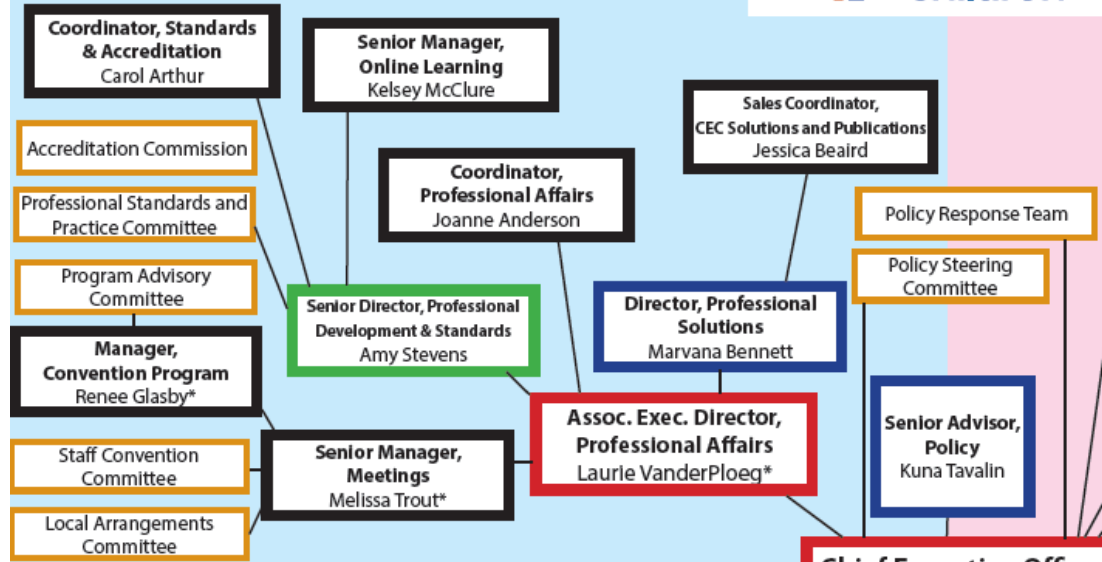
ENGAGEMENT

OPERATIONS

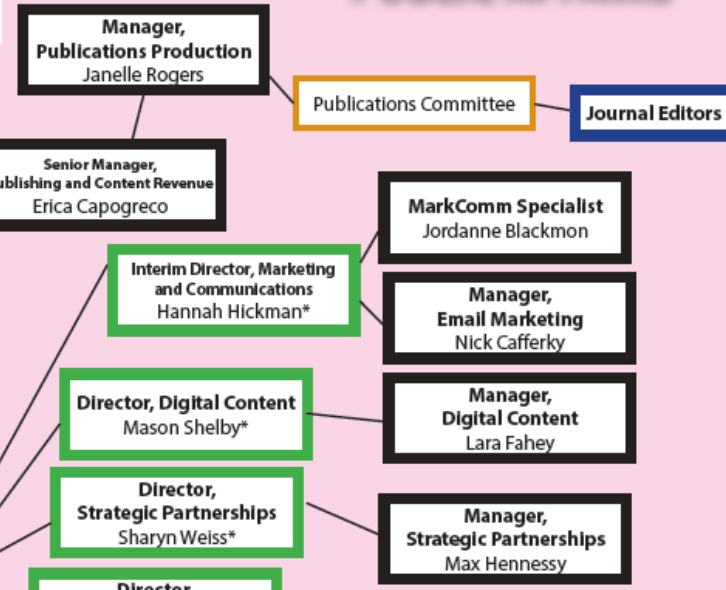
**Executive
Management
Contractors
Committees**

* Staff Convention
Planning committee

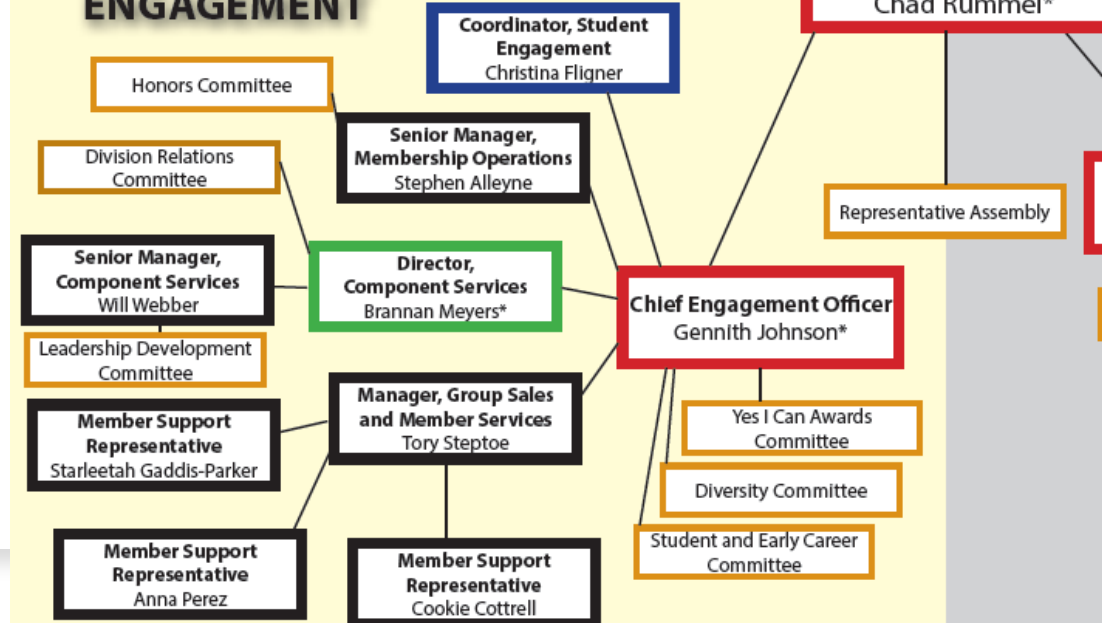
PROFESSIONAL AFFAIRS



PUBLIC AFFAIRS



ENGAGEMENT



OPERATIONS



**Executive
Management
Contractors
Committees**

* Staff Convention
Planning committee

Who you need to know:

DIVISIONS



Brannan
Meyers

UNITS



Will
Webber

CHAPTERS



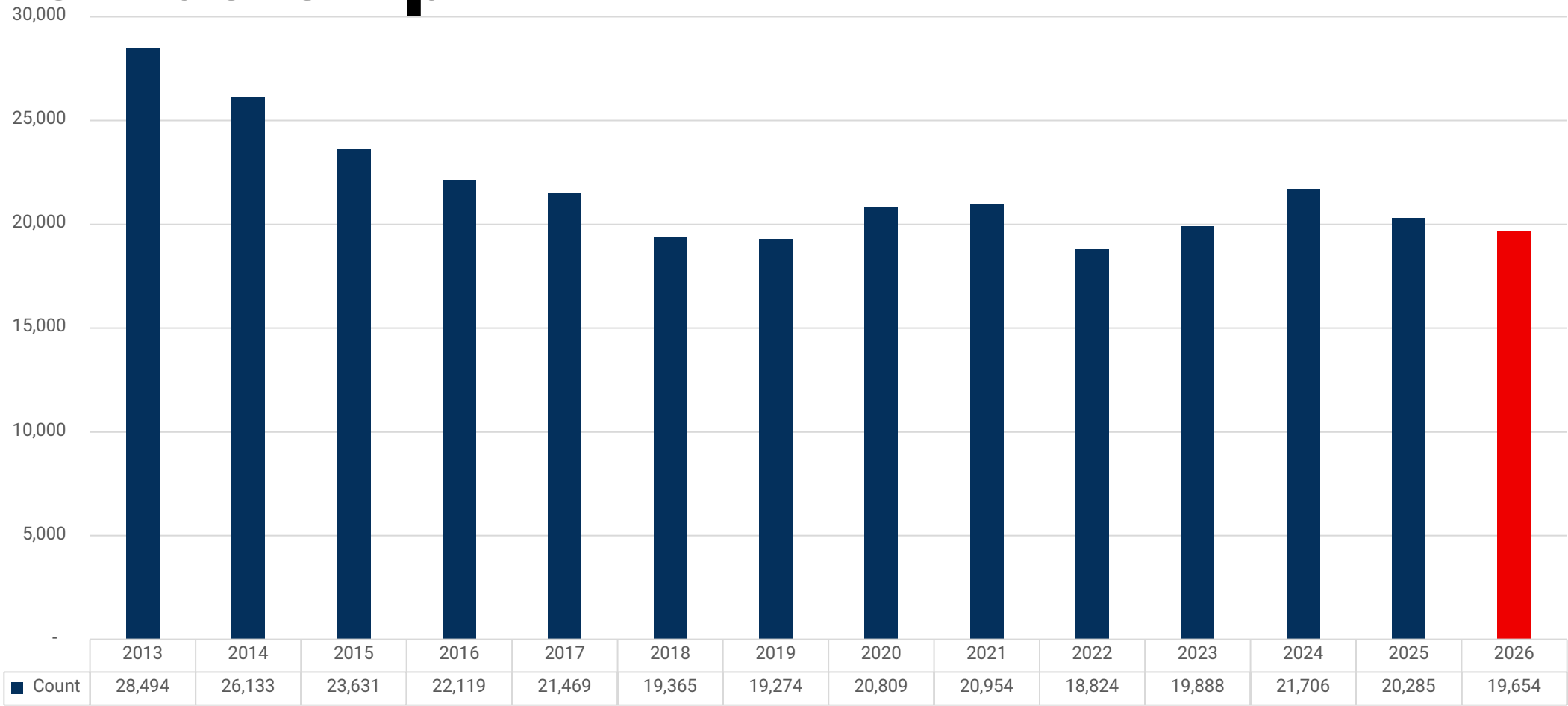
Christina
Fligner

State of the Council

- Getting to Know CEC
 - Umbrella Organization
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 - Staff
- State of the Council
 - Membership
 - Division/Unit Membership
 - Finances
 - Strategic Plan
 - New Initiatives

Membership

Total Members
(Through June 29, 2026)



In 2024, 10 CEC Divisions saw membership growth.

In 2026, only one CEC Division saw membership growth...

Division Member Growth
CASE (102)

Division by Percent Growth
CASE (1.78%)

25 Units Had Growth

1-14%

- Arizona
- Colorado
- Florida
- Idaho
- Indiana
- Maine
- Michigan
- Montana
- North Dakota
- Nebraska
- New Mexico
- Ohio
- Oregon
- South Carolina
- South Dakota
- Wisconsin
- Wyoming

25 Units Had Growth

25 Units Had Growth





Strategic Plan

Every CEC member
was invited to
**PROVIDE
INPUT**

1,886

INDIVIDUAL MEMBERS
COMPLETED
INITIAL SURVEY



15 FOCUS
GROUPS
WITH
VARIOUS
MEMBER GROUPS

7 FOCUS
GROUPS

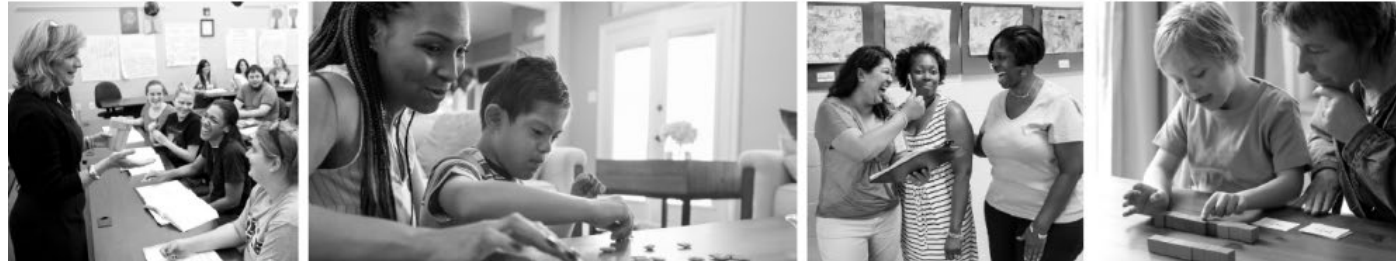
WITH
DIVISION
& UNIT
LEADERS

20+
HOURS OF BOARD

DELIBERATION &
CONVERSATION



FORWARD.



TOGETHER.

Council For Exceptional Children Strategic Plan
2022-2026

Strategic Goal #1

**Develop and support an effective
and diverse workforce of
special education professionals**

Strategic Goal #2

**Intentionally embed diversity,
equity, inclusivity, and
accessibility within CEC**

Strategic Goal #3

**Increase the impact of CEC's
policy agenda for education
professionals and for individuals
with disabilities and/or gifts and
talents**

Strategic Goal #4

**Establish CEC as a globally
recognized leader in the
field of special education**



News and Notes

Advocate. Empower. Impact.

Empowering exceptional learners and those who support them.



What's New at CEC?

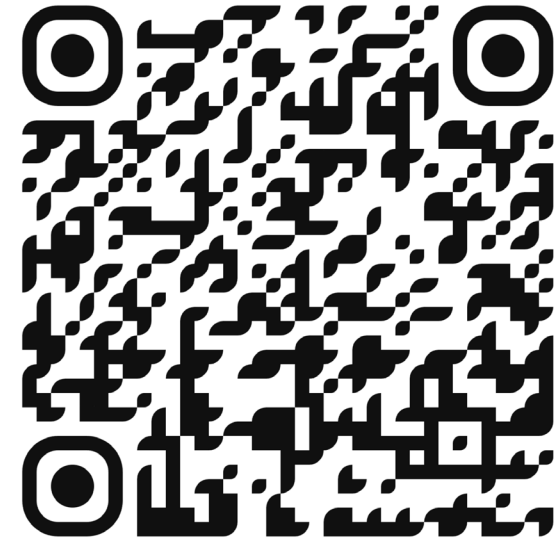
Two New Certifications

- National Certification for Transition Specialists (NCTS) –
Launched exam-based certification in March 2026
- National Special Education Paraprofessional Certification –
Launching in March 2027

New Member Benefit



CEC Teacher Empowerment Toolkit

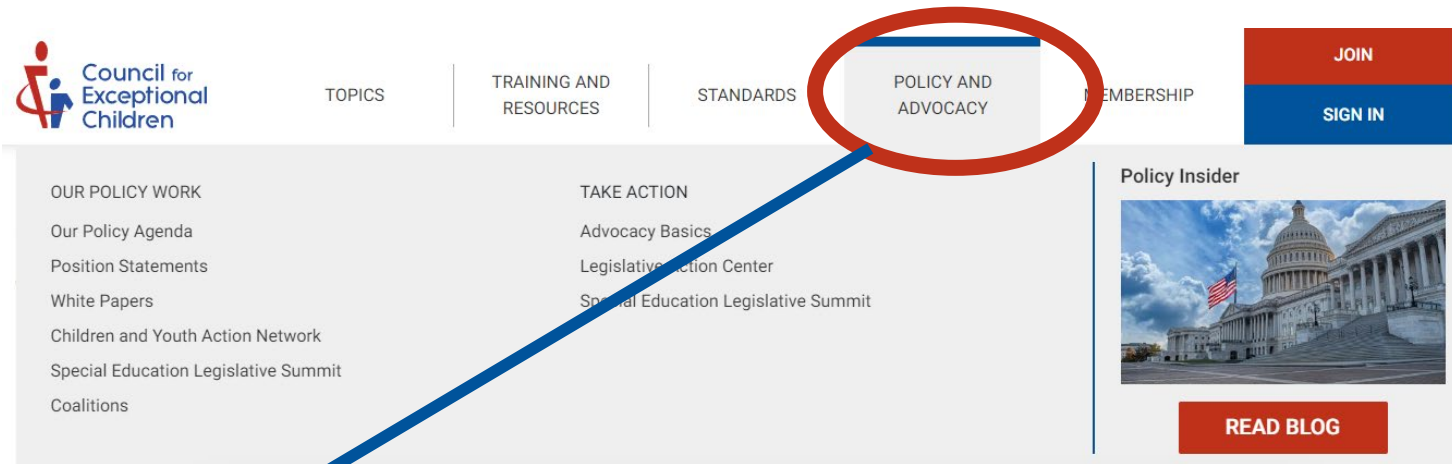


AI-powered assessment and instructional platform designed to support special educators and their students.

FREE to CEC Members

Policy & Advocacy

- View current policy agendas
- Visit the Legislative Action Center
- Advocate with CEC in person at SELS



Legislative Action Center

Support children w/ disabilities: Preserve the Department of Education

The Administration is actively working to shrink or eliminate the U.S. Department of Education, including possibly moving the Individuals with Disabilities Education Act (IDEA) to the Health and Human Services (HHS) Department. As special education professionals, we know that, at its core, IDEA is an *education* law. Moving IDEA programs to HHS would de-emphasize the purpose of IDEA to provide a free and appropriate public *education* and other critical activities to infants, toddlers, children, and youth with disabilities, and challenge the federal role to

Compose Your Message

- US Senators
- US Representative

Subject

Keep IDEA at the Department of Education

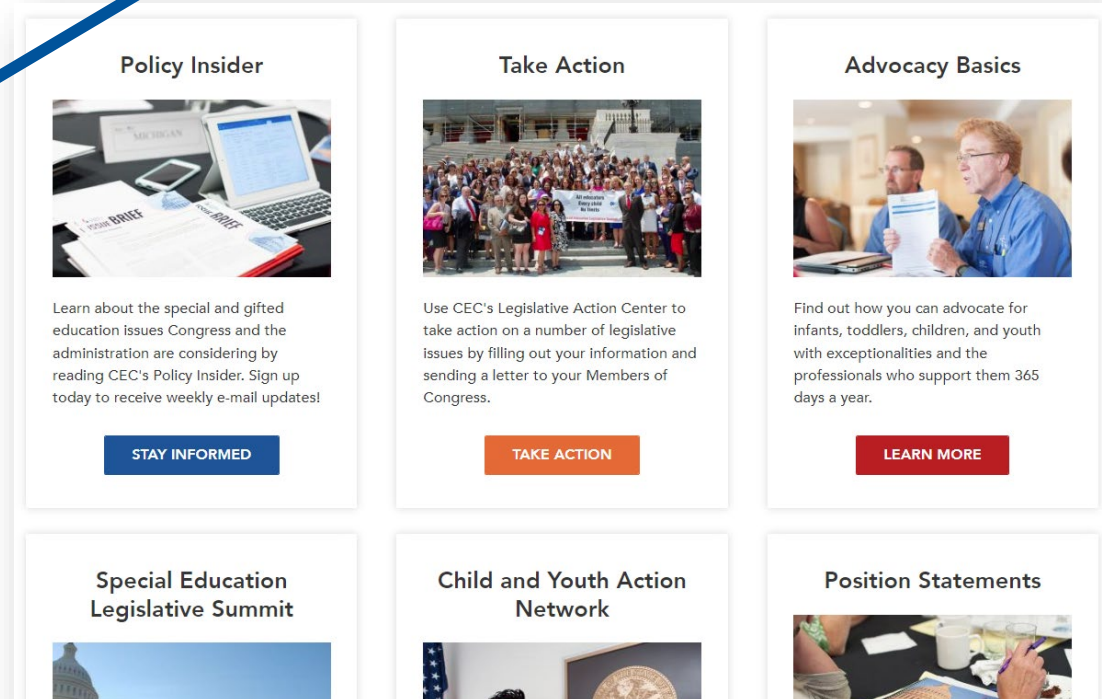
Message Body

As your constituent and a special educator, I urge you to preserve the U.S. Department of Education and its administrative role over the Individuals with Disabilities Education Act (IDEA).

Enter Your Info

Your Information

Prefix * First Name * Last Name *



Upcoming Online Learning

- **June 18:** AI Quick Take | Translating State AI Guidance in Classroom Practice
- **July 15:** Sponsored Webinar | BIPs in Practice: What Special Education Admins and Providers Need to Align On
- **July 22:** CEC/DEAL PD Series | Progress Monitoring for Writing: Assessment that Drives Instruction
- **July 29:** Live Webinar | Ensuring a Free Appropriate Public Education (FAPE): Lessons From the Due Process Hearing Front
- **August 4, 11, 18:** CEC/DEBH PD Series | Foundational Classroom Management Practices
- **September 8, 15, 22:** CEC/ISET PD Series | Building Your Tech Toolbox: New and Refreshed Tools to Support the Learners in Your Classroom

Upcoming Events

CEC events include:

- Special Interest Division Events
- State/Provincial Unit Events
- Convention & Expo Events
- Advocacy Events
- Virtual Events
- And more!

See all events:



Event Spotlight

NEW!

CEC UnifiED

- October 19-20, 2026
- Milwaukee, WI
- Featuring Special Interest Divisions: DDEL, DEBH, & DLD



**UnifiED
2026**

Our biggest event!

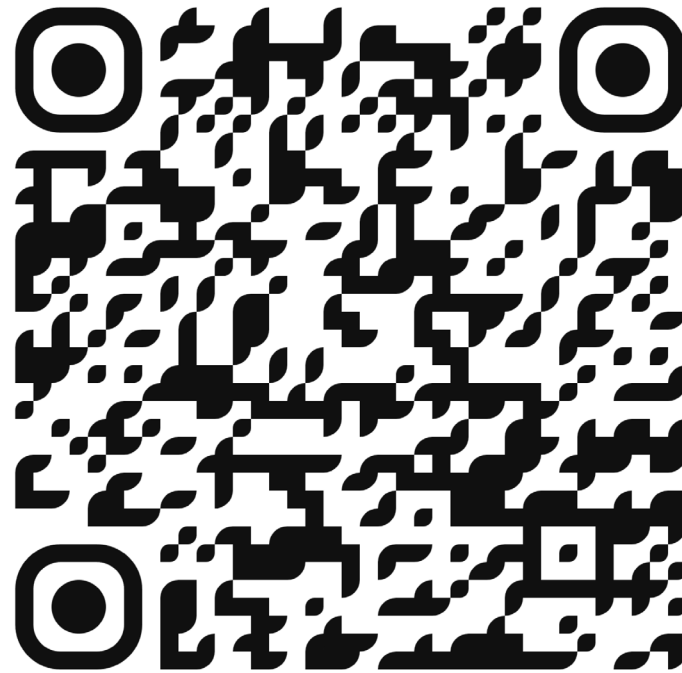
CEC 2027 Convention & Expo

- March 10-13, 2027
- Columbus, OH
- Call for Proposals & Reviewers closes Monday, June 1

**CEC
2027** | SPECIAL
EDUCATION
CONVENTION
MARCH 10-13



Want to know all the Convention updates?





CEC Professional Awards Nominations Open



Teacher of the Year | Outstanding Student Chapter Advisor
Special Educator Rising Star | Special Education Lifetime Achievement
Special Education Research | Outstanding CEC Leadership
Outstanding Paraeducator



**Nominations Open Until
September 30, 2026**



Supporting DEIA

Strengthening our Values

Adopted a *resolution* confirming CEC's Commitment to DEIA - reaffirming that these principles are at the heart of our mission and work

Investing in Change

Racial Justice Grants program, now in its third year, continues to empower members advancing equity-focused initiatives

Building Future Leaders

The third cohort of the *Diversity Leadership Academy* is supporting a new generation of leaders committed to fostering inclusive excellence across the field of special education

Diversity Leadership Academy 2026-2027



Alexis
Patterson
Lansing, MI



Aryanne Young
Lanham, MD



Charles Snow
Inglewood, CA



David Johnny
Atlanta, GA



Dottie Vea
Salt Lake City,
UT



Fang Xu
Toppenish, WA



Nikita Bates
Lithia, FL



Reynafe N. Aniga
Las Vegas, NV



Ruby (Roxanne)
Humphris
State College, PA



Shameka
Morris
Bronx, NY



Tony Jackson
Las Vegas, NV



Yunxuan Sun
Madison, WI

Student & Early Career Engagement



Launched New Events for Students & Chapters - including a
Student & Early Career Member Advocacy Townhall



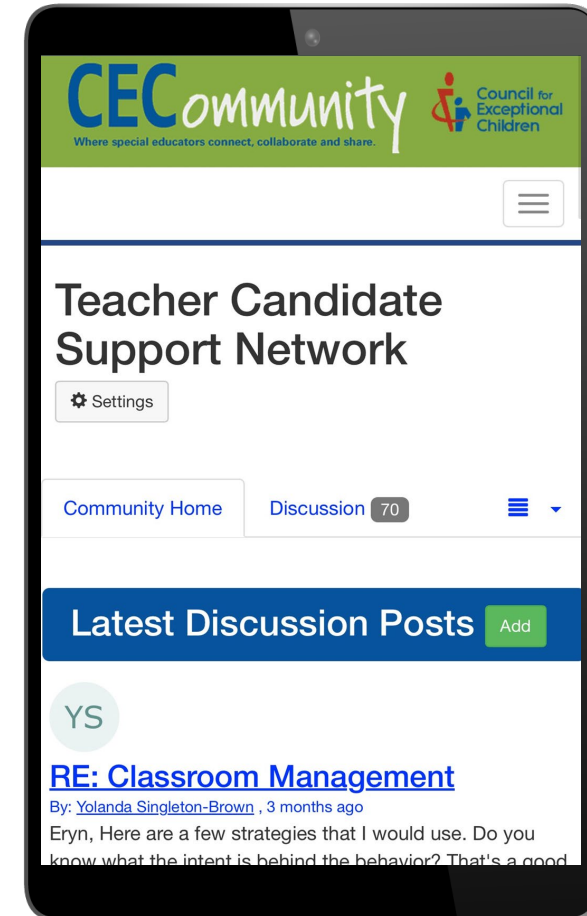
Teacher Candidate Support Network
Supported 600 Future Educators // Free Liability Insurance



Pre-Service & Student Mentoring Breakfast
Open to all students & early career attendees at the CEC Convention & Expo

★ Teacher Candidate Support Network

- Complimentary CEC Pre-Service Teacher Membership
- Access to resources to support student teaching
- \$1 Million Student Educator Professional Liability Insurance Policy and more!



Volunteer with CEC!



"Volunteering has opened me up to the wider world of special education outside of the classroom...I have a reinvigorated appreciation and love for special education and the exceptional students we serve."

Belkis Choiseul-Praslin
Student and Early Career Committee Member

**Most Committee Applications
Open this Fall**

Yes I Can Awards



NOMINATE TODAY!



New Podcast!

Rewriting the Narrative

Transforming Special Education



Endowment Funds Supporting CEC's Mission

Fund	Current Value	Supporting in 2026
Advocacy Fund	\$67,609	SELS Scholarships
Diversity Fund	\$82,393	Diversity Leadership Academy
Fund for the Future	\$53,952	Educator Recruitment Portal
Rising Stars Fund	\$34,564	Student Liability Insurance
Yes I Can Fund	\$38,721	Yes I Can Awards
Total	\$277,239	

How Members and Donors Support These Funds

Membership Giving: Members support designated funds during membership renewal and throughout the year.

Campaign Giving: Special campaigns, including Giving Tuesday, help grow support for mission priorities.

Friends of CEC: CEC's monthly donor community provides sustained year-round support beginning at \$10/month.

Elizabeth Farrell Society: recognizes donors who have made a lifetime gift commitment to support the future of CEC and the field of special education.

Join the
FRIENDS OF CEC



Monthly Giving. Lasting Impact.

Help Shape CEC's Next 5-10 Years

Your input will directly shape CEC's priorities, initiatives, and actions

Questions or ideas? Connect directly with:

CEC President, Ben Tillotson
president@exceptionalchildren.org

Chief Executive Officer, Chad Rummel
director@exceptionalchildren.org

FORWARD.



TOGETHER.

Council For Exceptional Children Strategic Plan
2022-2026

A Word From Our Sponsor



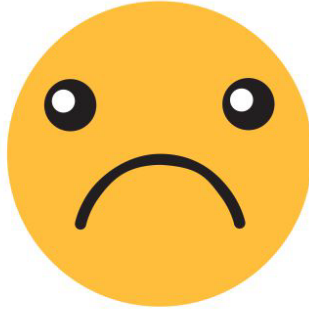


Richard Capone
CEO/Co-Founder

Emotion Mood Face Chart



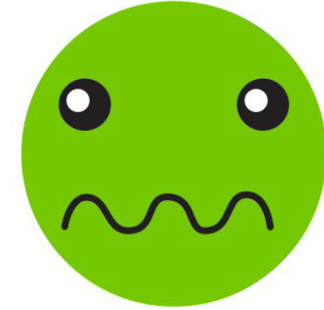
Excited



Sad



Angry



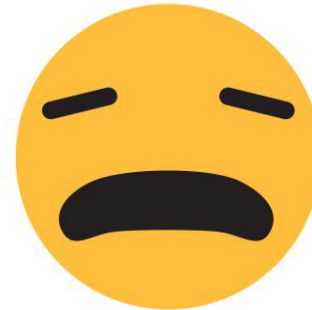
Sick



Surprised



Happy



Unhappy



SCARED

Avoiding Legal and Financial Pitfalls

Chad Rummel, M.Ed, CAE
2026 Leadership Institute



SCARED

Four Truths and a Lie



Four Truths and a Lie

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

Four Truths and a Lie

- I have testified in a courtroom following an embezzlement at an association where I worked;

Four Truths and a Lie

- I have been a plaintiff on a breach of fiduciary responsibility lawsuit against an association Board, ultimately leading to the termination of the Executive Director and Deputy Director;

Four Truths and a Lie

- 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 CEC volunteer worried about indemnification and his legal responsibilities;

Four Truths and a Lie

- I am a lawyer.



SCARED

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

Fiduciary Responsibilities

- 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"

Fiduciary Responsibilities

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

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Duty of Obedience	Follow the Rules	Bylaws, Mission, Policies

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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

Hierarchy of Guiding Documents

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



Image created using CHatGPT

Hierarchy of Guiding Documents

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

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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

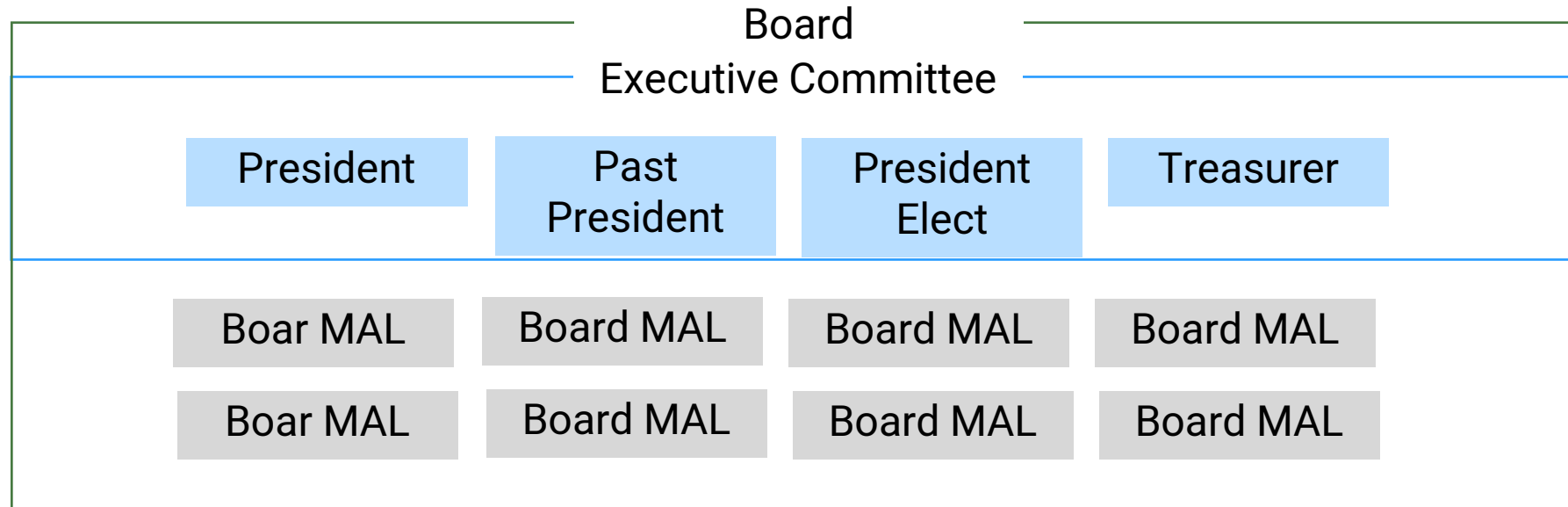
Governance Nomenclature



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



Chapters

SIGS

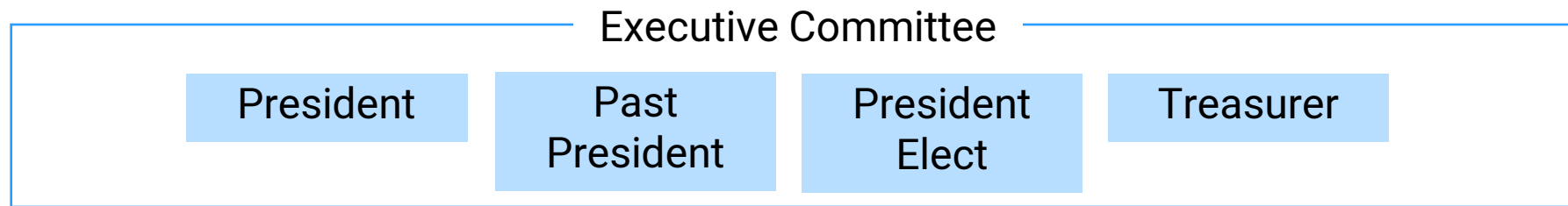
Committees

Workgroups

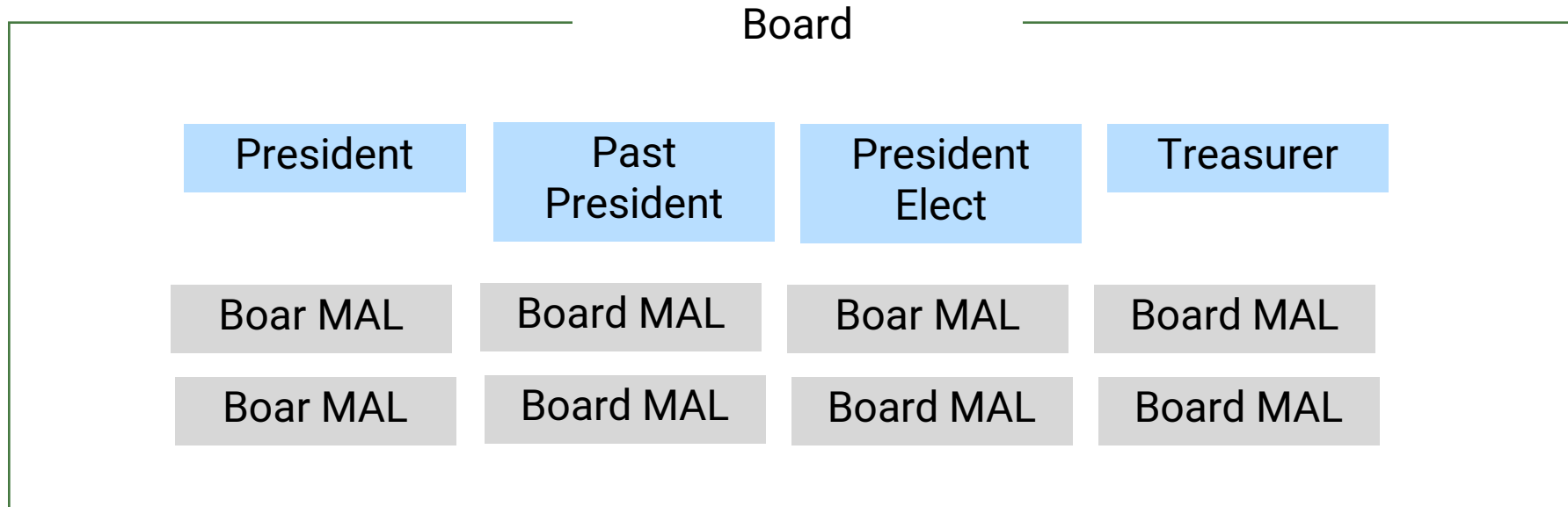
Subdivisions

CASE STUDY: SPSP

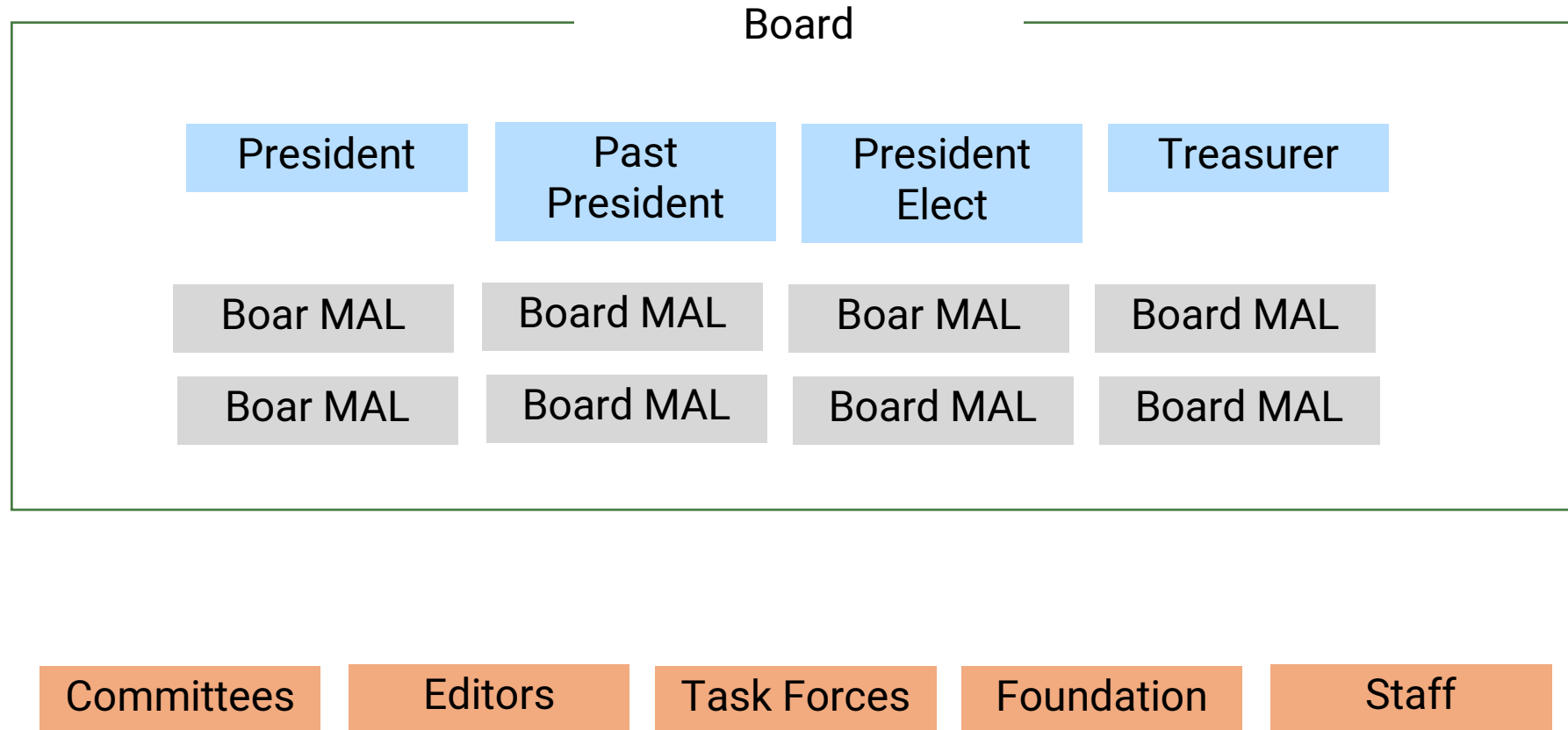
CASE STUDY: SPSP



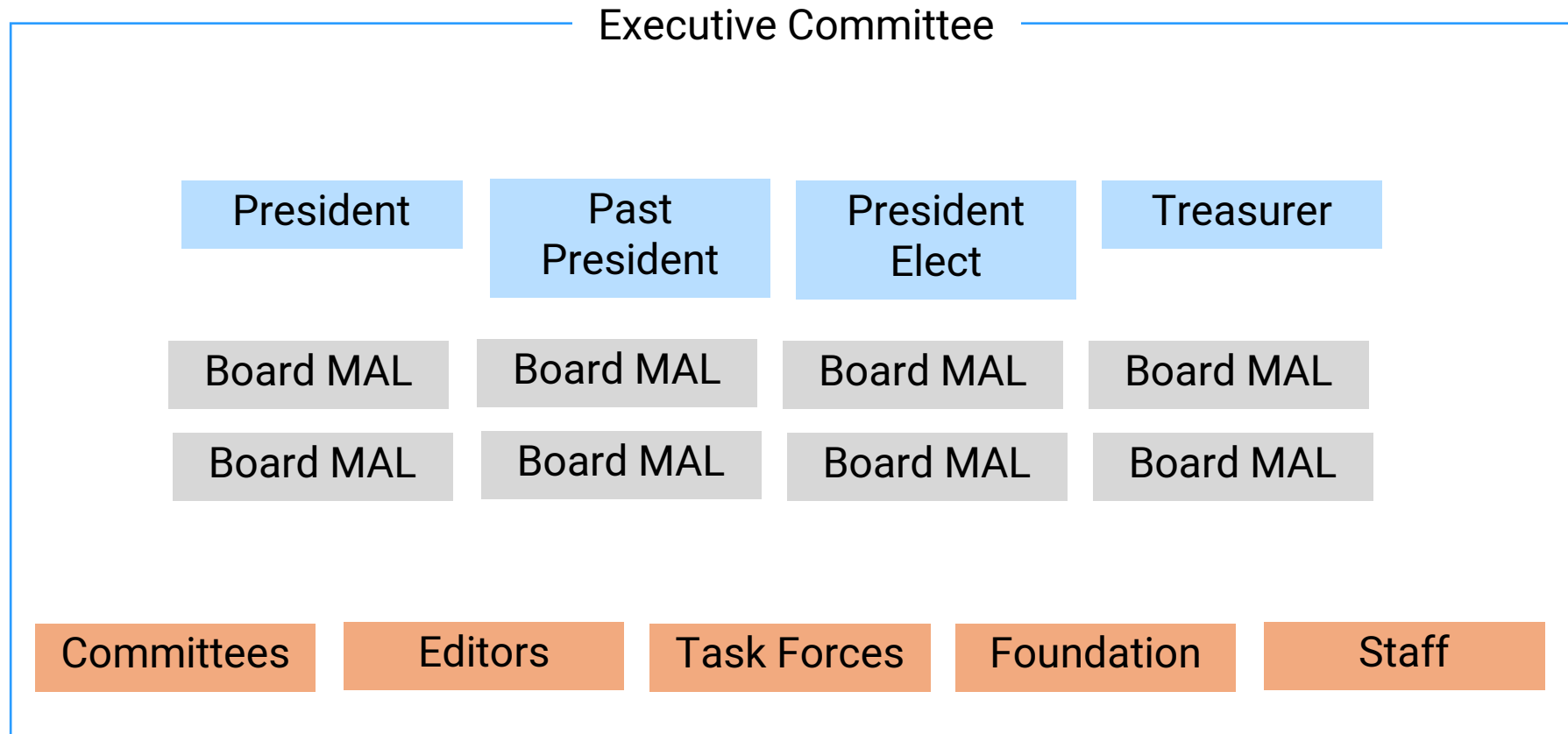
CASE STUDY: SPSP



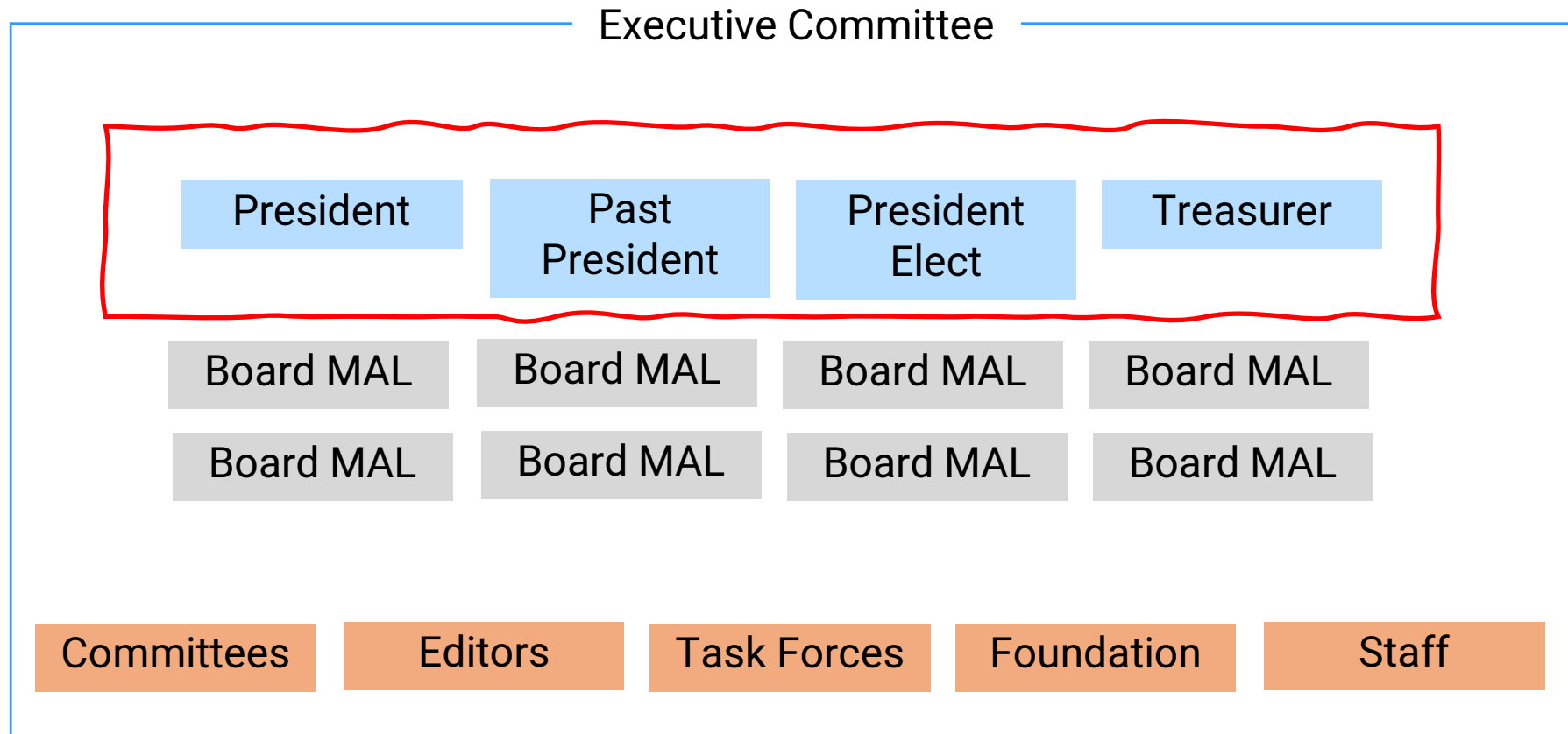
CASE STUDY: SPSP



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CASE STUDY: SPSP



Insurance

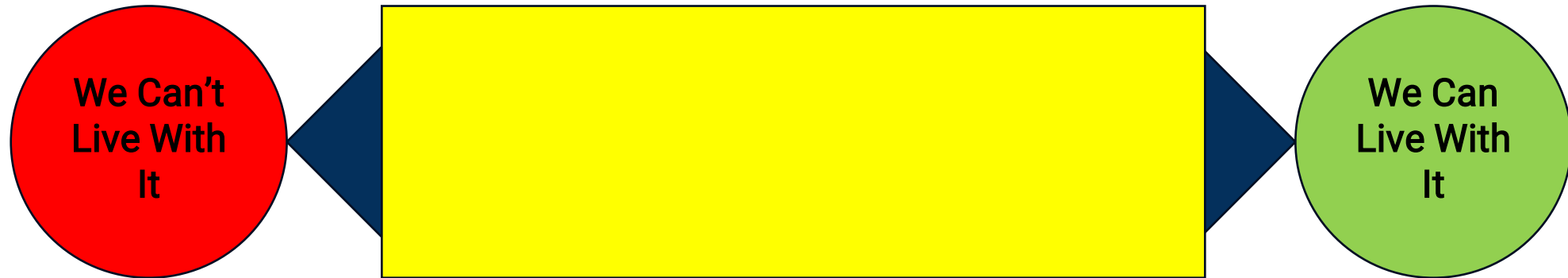
- Anyone involved in the nonprofit organization – including directors, officers, employees and volunteers – could be held personally liable for errors or omissions involved in the management of the organization.
- Types of lawsuits:
 - Employment/Contract Issues (90% of nonprofit lawsuits)
 - Fiduciary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

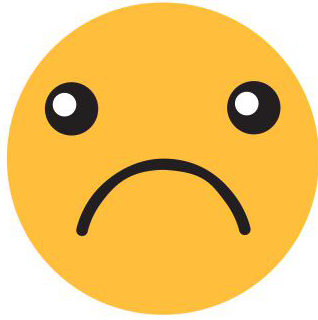
- Chad's Must-Haves
 - Attrition/Slippage of 20%+
 - Any revenue minimums and ability to decrease
 - Cancellation Clause
 - Force Majeure Clause
 - Alcohol Responsibility Clause
 - Walk Clause
 - Rate Integrity Clause
 - Resell/Rebook Clause
- If not experienced, use a third party (CEC can recommend)

So.....

Emotion Mood Face Chart



Excited



Sad



Angry



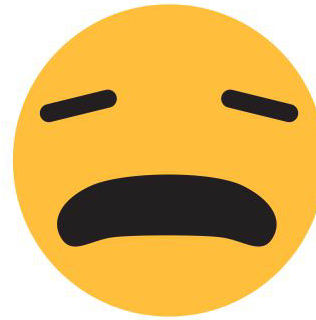
Sick



Surprised



Happy



Unhappy



SCARED

Questions

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



Questions



DIVISIONS

Brannan Meyers, CAE
bmeyers@exceptionalchildren.org



UNITS

Will Webber, CAE, CVA
wwebber@exceptionalchildren.org

BIO BREAK

**Program Resumes
at 3:20**

A Word From Our Sponsor





Jay Perkins
Founder



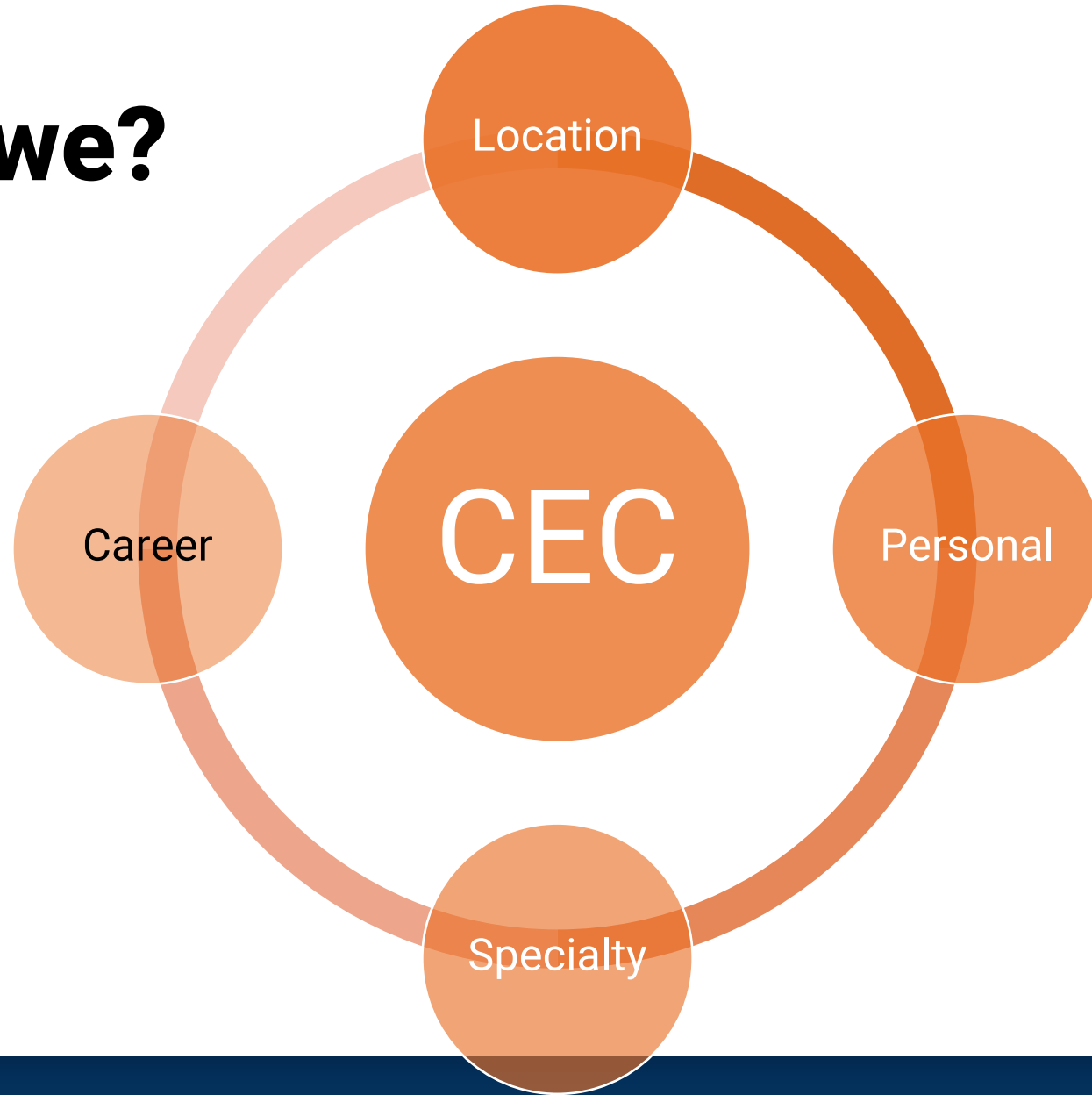
Meeting the Moment: **Build** and **Deliver** Member Expectations

Chad Rummel, CAE
Brannan Meyers, CAE

Agenda

- ☐ Understanding CEC Membership
- ☐ The Membership Cycle
- ☐ Branding
- ☐ Recruiting
- ☐ Proposition Value
- ☐ Engaging
- ☐ Next Steps

Who are we?



Categories

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

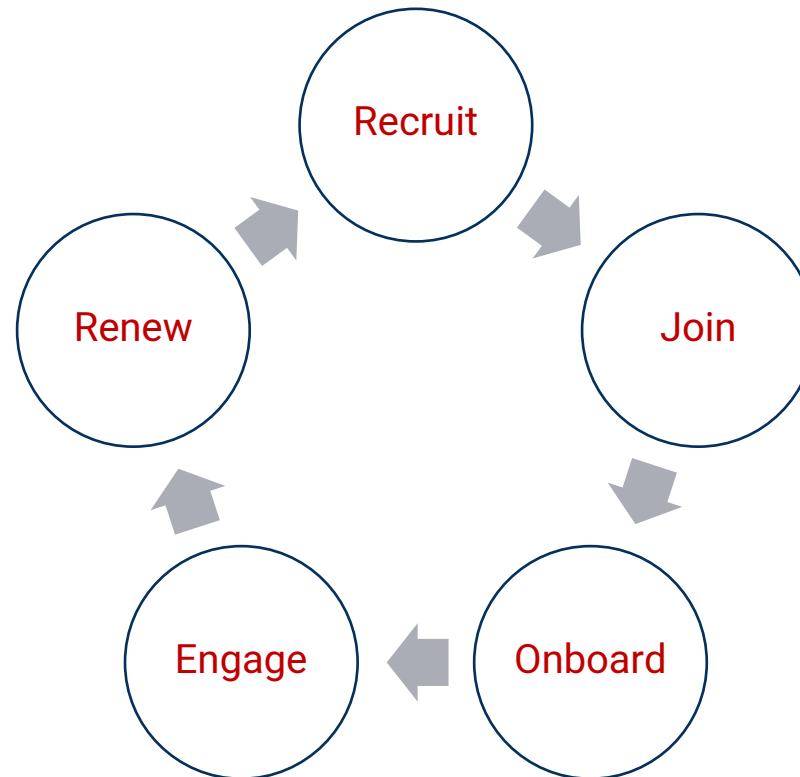
Tiers

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

Group Memberships

- ☐ 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 Partnerships– Customized upon request to include membership, PD, books, etc; designed for State Departments, typically created to support Early Career

Understanding Membership



Understanding Membership



Who is Happier with CEC?

Suzanna



Published in Journal
Serves on CEC Committee
Advises Student Chapter

Joanne



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

Engagement

- ☐ 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

Brand vs. Logo

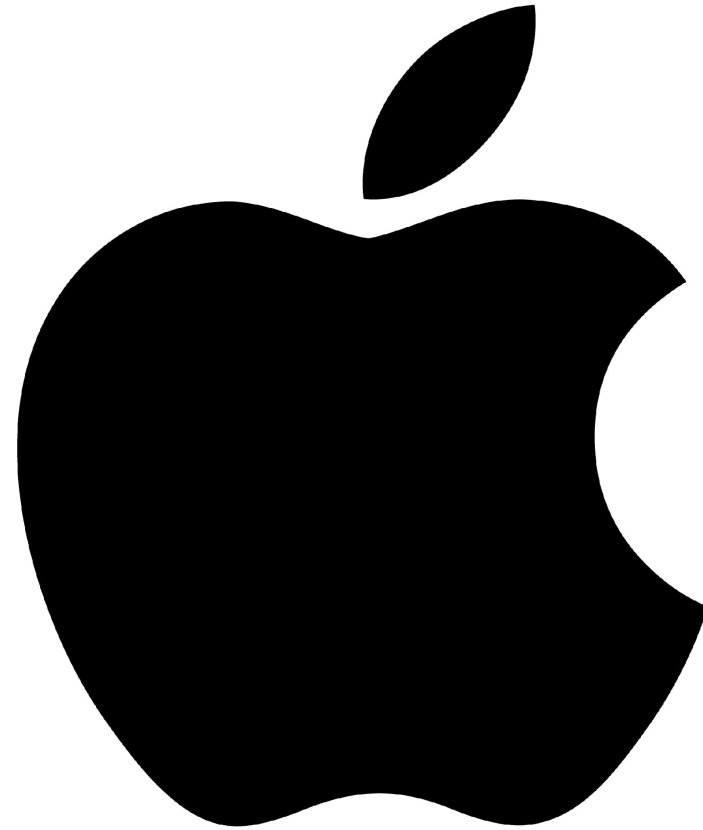
Brand

- Feeling about a product/company
- Perception of a product/company
- Association with a product/company

Brand Identity (Logo)

- Triggers the brand
- Visual Logo
- Verbal





amazon

The Amazon logo, featuring the word "amazon" in a dark blue, sans-serif font. Below the word is a thick, orange curved arrow that starts under the 'a' and points towards the 'n', resembling a smile.



Grey Poupon











MARRIOTT

MARRIOTT BONVOY™

Luxury

EDITION®



THE
LUXURY
COLLECTION



W
HOTELS



Premium



WESTIN®
HOTELS & RESORTS

Le MERIDIEN



AUTOGRAPH
COLLECTION®
HOTELS

TRIBUTE
PORTFOLIO



Select

COURTYARD®
BY MARRIOTT



SPRINGHILL SUITES®
MARRIOTT

Fairfield®
BY MARRIOTT



Longer stays

Residence INN.
BY MARRIOTT

TOWNEPLACE
SUITES®
MARRIOTT

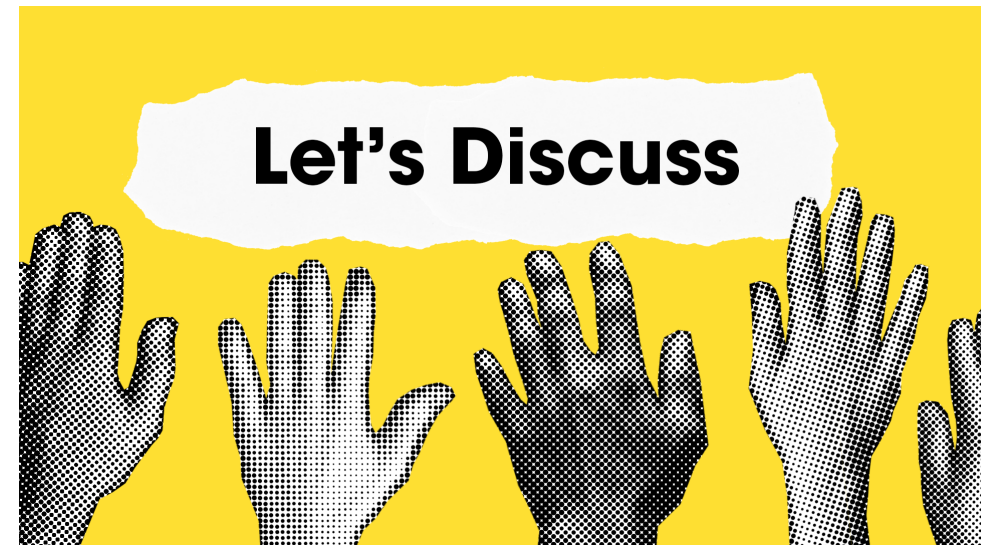




Council for Exceptional Children

Elevator Speeches

- ☐ How would you describe CEC to a friend or family member not associated with education?
- ☐ What would you say to a potential member to convince them to join?



Elevator Speeches

- ☐ What are the themes we heard through each of those elevator speeches?

Recruit



Why People Join

Feature
Journals
Webinars/Events
Resources
All Member Forum



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



Why People Join

	Actual Value
Fea	Stay abreast on new research and access to practice strategies
Jo	
We	Build the skill set you need to be a high performer
Res	Implement new strategies and tools to enhance your job performance
All	Learn and grow alongside like-minded colleagues and mentors



Proposition Value

- ❑ 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
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Emotion-Driven

Member-Focused (“You”)

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Emotion-driven

Member-Focused ("You")

Program Showcase

Your Peers

Program Showcase



Karen Akom
President-elect
Virginia Unit

Director, Field Operations
Center on Transition Innovations
Virginia Commonwealth University

Steal This Idea

Specifically Designed Instruction Book Study

Description

Virginia CEC just completed our first book study. We met virtually, were joined by some of the authors, and spent time learning and growing together.

Program Showcase



Connor Archer
*President
Maine Unit*

*Founder, President &
Chairman/CEO
The Courageous Steps Project*

Steal This Idea

The Power of Partnership

Description

As Maine CEC heads into a year of growth and expansion, the power of partnership is essential in empowering current members, future members, and community partners who can come together to empower our profession. The vision is to leverage current groups and resources to create advisory panels that will create connections and future collaborations for meaningful progress and work.

Steal This Idea

The Power of Partnership

- Collaboration on Conferences/Events
- Shared Organizational Systems
- More Manpower to Grow Sustainability for the Future

Program Showcase



Kalia Cole
CAN Coordinator
Arizona Unit

Student
Arizona State University

Steal This Idea

Special Education Advocacy Learning Series

Description

Get special education leaders, such as policy makers, superintendents, and lobbyists, to talk to a group of CEC members and teachers about common concerns/tools on special education. This is a Zoom learning series, and members can sign up.

Program Showcase



Tracy Colebrooke
Treasurer
Georgia Unit

Special Education Facilitator
Burke County Public School
System

Steal This Idea

GA CEC Annual Conference



Description

- Engage. Connect. Learn. Lead. Have FUN!!!

Steal This Idea

GACEC Annual Conference

- With sessions spanning the full landscape of special education, the GaCEC Annual Conference remains *the* premier professional learning event for educators serving students with disabilities and/or gifts and talents in Georgia. This year's theme—**Y'all Means All**—underscored our commitment to inclusive, equitable, and high-impact practice for every learner across Georgia.
- Cutting-edge research, evidence-based strategies, and practical tools they can implement immediately to elevate their expertise and strengthen outcomes for all Georgia learners.

Program Showcase



Stacie Dojonovic
Executive Director
DCDT

Steal This Idea

Transition Talks (Practitioner Support)

Description

DCDT's Let's Talk Transition is a free monthly member networking series held on the first Thursday of each month that brings transition professionals together to connect, share successes, exchange practical strategies, and collaboratively problem-solve. As a key member benefit, the series strengthens connections with members, provides a forum to listen and respond to member needs, fosters a supportive professional community, and creates opportunities to engage with DCDT leadership and peers.

Program Showcase



**Sudha
Krishnan**

*President-elect
DISES*

*Associate Professor,
San Jose State University*

Steal This Idea

Write an Info Brief on the Site Visits from the DISES Conference

Documenting Learning from School Visits

- School visits are a cornerstone of the DISES International Conferences.
- Capture and document learning exchanges from these visits for conference participants.
- Develop a sustainable system to document and share insights for future DISES conferences

Program Showcase



Joe Kwisz

President: CASE

Past President: IN CASE

Executive Director

Old National Trail Special Services

Steal This Idea

ASSET: Aspiring Statewide Special Education Teacher

Description

Indiana CASE developed a state approved and accredited transition to teaching licensure add-on program that is no cost to licensed teachers, and is aligned to the CEC standards. Current teachers can add mild, intense, or both endorsements to their current license.

Steal This Idea

ASSET: Aspiring Statewide Special Education Teacher

- 4 Cohorts-750 Graduates
- Breaks down barriers of cost and time
- 1 year job embedded program completed during contract hours
- 99% 1st attempt Praxis Pass Rate
- Partnership with State Department of Education for funding
- Average cost per license +/- \$1,500
- ROI for your state=FILLING TOUGH VACANCIES EFFICIENTLY!

Program Showcase



Mikyung Shin
President
ISET

Assistant Professor
Illinois State University

Steal This Idea

A social media or communications strategy for keeping members informed

Description

Develop and organize content relevant to the division's focus areas and current community issues. Communicate timely updates through social media and support member engagement.

Program Showcase



Antoinette Taylor PhD
Convention Committee: Program
Book, Poster Presentation
Coordinator
Illinois Unit

P-12 SpEd (LBS1) Instructor/Field
Supervisor - UGC, MAT,
Alternative Pathways, and
Resident Program
National Louis University

Steal This Idea

Thank You Goes A Long Way

Description

Time spent thanking local and national organizations that support CEC action alerts, sign on letters, etc. is time well spent on behalf of children, families, and those who serve them.

Steal This Idea

Thank You Goes A Long Way

On Friday afternoon, October 10th the current Administration announced via the Office of Management and Budget (OMB) that a widespread “reduction in force” (RIF) of federal employees was under way, impacting the U.S. Department of Education (ED), among other agencies.

Included in the thank you was as an opportunity to talk about CEC as a comprehensive organization with resources and a variety of special interest groups and an ask to review some of the resources with the person in their organization/agency who holds the education position or a similar role.

Shortly thereafter CEC shared who signed on as opponents of this move. The list included a national and state by state breakdown of organizations and agencies. Reaching out to thank the state organizations as well as national organizations/agencies that have subdivisions/offices in Illinois created a connection. This connection has become a revolving door to continue sharing action alerts coming from CEC to the contacts already in place before October 2025 and those established because of the October 2025 sign on.

This was also an opportunity to invite these same local organizations to send someone to an ICEC Convention and ultimately to ask both local and national supporters to think ahead and plan to attend and support the CEC 2028 convention being held in Chicago to see CEC “in action” as the comprehensive organization that it is.

Program Showcase



Melissa Taylor
Executive Director
IAASE

Membership & Awards Chair
CASE

Steal This Idea

Ready, Set, Join! Membership Race

Description

We held a month-long membership drive with a race theme. Our regions competed against each other to see who could grow the most and there were individual prizes for new member referrals.

Steal This Idea

Ready, Set, Join! Membership Race

THE MEMBERSHIP RACE IS ON!
READY, SET, JOIN!

The Ultimate Referral Showdown has officially left the starting line - now it's your chance to accelerate your region to victory!

From now until **OCTOBER 3**, every new member you recruit puts your team one lap closer to the finish line (and a shot at the prizes).

HOW IT WORKS
Each region starts with a baseline number of members. The goal? **INCREASE YOUR REGION'S MEMBERSHIP PERCENTAGE** by recruiting new members before the final lap on **OCTOBER 3RD**.

REGIONAL PRIZES:
1st Place - \$1,000
2nd Place - \$500
3rd Place - \$250

INDIVIDUAL PRIZES
\$300 Amazon Gift Card
\$200 Amazon Gift Card
\$100 Amazon Gift Card

Get in gear, rally your region, and race toward rewards.
The track is open.
The clock is ticking.
READY, SET, JOIN!

The Results



Region	8/20/25 Membership	10/3/25 Membership	Percentage Growth
1	170	304	79%
2	68	112	65%
3	43	94	119%
4	50	65	30%
5	43	69	60%
6	27	43	59%
7	106	194	83%
8	90	167	86%

The Competition



Program Showcase



Mike Ubbens
Vice President
Pennsylvania Unit

Supervisor, Special Education
Avon Grove School District

Steal This Idea

Leverage Partnerships

Description

We co-hosted our annual conference with our CASE division and had great success! We are also working with a partner to memorialize our processes through a closed source AI agent.

Program Showcase



Mary Rosser
Secretary
Ohio Unit

Assistant Professor
Capital University



Riley Seielstad
Member-at-Large
Ohio Unit

Intervention Specialist
Licking Heights School
District

Steal This Idea

New Teacher Institute: Mentoring to Retain Special Educators in Ohio

Description

Partnered with OH Department of Education and Workforce, NTI provides support, resources, and networking for early career teachers; offers free CEC membership along with mentoring from an experienced educator, as well as scholarships to attend national and state conferences.

Steal This Idea

New Teacher Institute: Mentoring to Retain Special Educators in Ohio



<https://mentoring101.my.canva.site/>

Reach out with questions!

Erin Loomis
Membership & Mentoring
Committee Chair

ohionti2022@gmail.com

Annual Planning for Your Component

Setting Your Priorities for the Year Ahead

Brannan Meyers, CAE

Will Webber, CAE, CVA

Why This Matters

A strong year doesn't happen by accident. It happens because someone put dates on a calendar.

That's what we're doing together right now.

What Makes a Strong Component Year

- Members are engaged, not just enrolled
- The board runs itself even when one person is out
Something happens every quarter, not just at conference time
- Paperwork and deadlines are handled before they're urgent

The CEC Annual Calendar at a Glance

March

- Convention

May

- 990 due (US FY Jan-Dec)

July

- SELS
- Leadership Institute

September

- Professional Awards Nominations Deadline

November

- 990 due (US FY July-June)

A Sample Plan

1. Professional Development
2. Membership
3. Communications
4. Operations

Professional Development

Goals:

What Will Success Look Like:

Jan	Feb	Mar	April	May	June
Promote CEC Convention (Regular Reg. Ends)		CEC Annual Convention	Virtual CEC Convention	Annual Convention Call for Proposals Opens	Annual Convention Call for Proposals Closes Convention Registration Opens
July	Aug	Sep	Oct	Nov	Dec
Annual Convention Schedule Published SELS			Annual Convention Full Program Published		

Learn About Opportunity:

30-Day Campaign

- Newly launched for rolling recruitment

Empowering Educators. Impacting Students.

- Theme for this year's over-arching recruitment initiatives
- Four larger recruitment drives
- Two targeted drives



CEC 2026-2027 Recruitment: Back-to-School

First Recruitment Drive

- Back-to-School (August 1- September 30)
- A social media graphic will be given to Component leadership
 - Week of August 3 (when recruitment drive is live)
 - The link takes prospective members to a lead capture page



8 Keys to Creating Ironclad IEPs

A webinar with practical guidance that takes the guesswork out of IEPs

Watch for Free

<https://tinyurl.com/Ironclad-IEP-Webinar>



Council for
Exceptional
Children

**Empowering Educators
Impacting Students**

Example: Membership

Goals:

What Will Success Look Like:

Jan	Feb	Mar	April	May	June
New Year Welcome Message New Member Meet & Greet	New Member Meet & Greet	CEC Annual Convention	New Member Meet & Greet	New Member Meet & Greet	New Member Meet & Greet
July	Aug	Sep	Oct	Nov	Dec
CEC Leadership Institute New Member Meet & Greet	Back to School Campaign New Member Meet & Greet	Back to School Campaign New Member Meet & Greet	Annual Convention Full Program Published New Member Meet & Greet	New Member Meet & Greet	New Member Meet & Greet
	Promote Social Media Graphic on Facebook				

Common Planning Pitfalls

- Too many priorities (pick 2–3, not 7)
- No named owner ("the board" isn't an owner)
- No date, so it never happens
- Confusion over authority vs. delegation vs. a board vote/decision
- Copy-pasting last year's plan without checking what actually worked

Your Challenge

- Write down your ideas throughout the Institute
- Bring your filled-in handout to your next board meeting
- Turn your top priority into a real agenda item

Closing Remarks