

Welcome to the 2026 Leadership Institute

Council for Exceptional Children



Richard Capone
CEO/Co-Founder



Strategic Volunteer Engagement

at any stage and why respect matters



Agenda

- What is Strategic Volunteer Engagement?
- Why is it important?
- How to Identify Gaps In Your Strategy
- How to Address Identified Gaps
- Next Steps



- Who is in the room?
- How many years have you been in volunteer engagement?
- Have you ever created a strategic plan?
- Why or Why not?



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Who is in the room?

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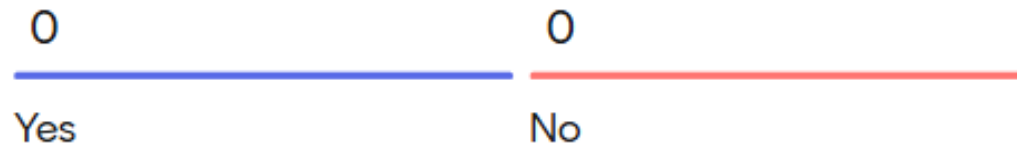
How many years have you been in volunteer engagement?



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Have you ever created a strategic plan for your volunteer engagement?



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Why or Why Not?

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What Does Strategic Volunteer Engagement Mean?





Strategy:

The way in which a business, government, or other organization carefully plans its actions over a period of time to improve its position and achieve what it wants.



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**Why
is this
important?**



1. You need to understand where you are.

2. You need to know where you want to go.

3. Having a plan on how to get there helps to:

- avoid mishaps
- avoid wasting time
- minimizes duplication of efforts
- encourages collaboration



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National Volunteer Strategy:

A Thriving Ecosystem

The systems, leadership, infrastructure, investment, and partnerships needed to support volunteer engagement over time.

Transformative Impact

Stronger communities where people are more connected, needs are better met, and change is increasingly shaped by those closest to it.

Meaningful Engagement

Volunteer experiences that are relational,



Proactive or Reactive?





- 1 Goal
- 2 Assessment
- 3 Identify Areas of Improvement
- 4 Create a Plan
- 5 Determine Capacity
- 6 Act on the plan
- 7 Build on Trust and R.E.S.P.E.C.T

Dream Without Limits

What is the vision you have for your volunteer engagement strategy?

Expression Helen Jane Long



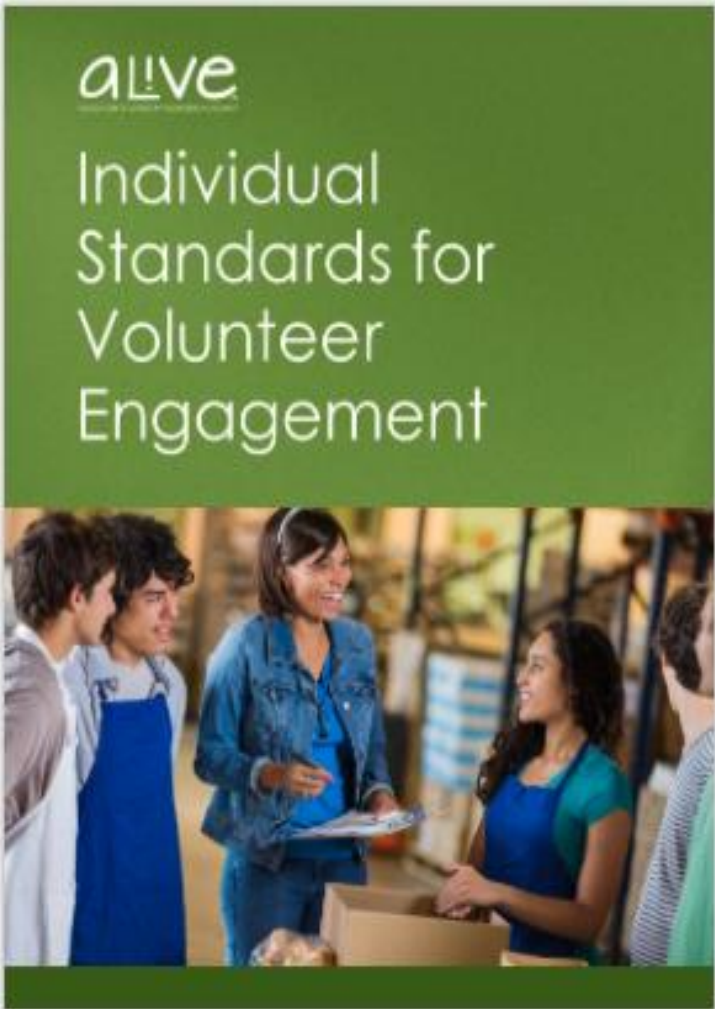
Identify Gaps in Your Strategy



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Assessment Overview



CVA Self-Assessment Tool
This document is intended to provide guidance when studying for the CAVS Exam. By assessing your own level of knowledge and experience in each topic area, you can identify areas that might require further study or review.

1 = minimal or no knowledge or experience; requires study
 2 = some knowledge or experience; requires review
 3 = know and understand, with solid experience; little or no review needed

A. Plan for Strategic Volunteer Engagement	1	2	3
1. Assess organizational needs and opportunities for volunteers			
2. Promote organizational readiness (e.g., commitment, capacity, competency)			
3. Research and analyze related programs and services			
4. Develop goals and objectives for volunteer services			
5. Develop policies and procedures for volunteer services			
6. Develop supporting tools and resources for volunteer services (e.g. forms, databases)			
7. Develop evaluation plan for volunteer services			
8. Develop risk management plan for volunteer services			
9. Establish benchmarks for volunteer services			
10. Implement evaluation plan for volunteer services			
B. Advocate for Volunteer Involvement	1	2	3
11. Design communication plan for volunteer services			
12. Implement communication plan for volunteer services			
13. Evaluate communication plan for volunteer services			
14. Inform stakeholders of volunteer service opportunities			
15. Enlist stakeholders in promoting volunteer service opportunities			
16. Develop volunteers as advocates			
17. Advocate for volunteer services (to stakeholders and community)			
18. Cultivate stakeholder and partner relationships			
19. Collaborate with stakeholders			
C. Attract and Onboard a Volunteer Workforce	1	2	3
20. Identify current needs for volunteers			
21. Develop volunteer position descriptions			
22. Develop performance objectives for volunteer roles			
23. Design recruitment strategy for volunteers			
24. Implement recruitment strategy for volunteers			
25. Respond to volunteer inquiries			
26. Select applicants for interviews			
27. Conduct applicant interviews			
28. Administer screening process			
29. Match volunteers with assignments			
30. Evaluate placement of volunteers			
31. Evaluate recruitment strategies			

Diagnostic and Debrief: Volunteer Engagement Organizational Assessment Service

ALIVE offers organizations a low-risk, high-value research-based organizational assessment service to provide leaders with a clear, data-informed snapshot of how effectively an organization engages volunteers, and a focused roadmap for strengthening capacity and impact.

Delivered by Service Enterprise Licensed Providers nationwide, the process offers expert guidance and actionable insights—enabling leaders to determine whether deeper investment—such as Service Enterprise Accreditation—makes sense.

Why This Assessment Matters

For many organizations, volunteer engagement is either under-leveraged or overly relied upon without the necessary infrastructure to support it.

The Assessment Helps Leaders:

- Understand whether volunteer engagement is truly strategic
- Identify where small, targeted investments can reduce staff strain and increase impact
- Align leadership, programs, and operations around a shared vision for engagement
- Make stronger, informed decisions around engagement

About the Assessment

ALIVE uses the Index of Volunteer Engagement (IVE) Diagnostic and Debrief tool to conduct the assessment. This tool is grounded in extensive research by The University of Texas at Austin's RGK Center for Philanthropy and Community Engagement. The tool:

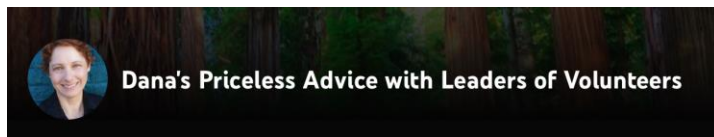
- Measures the degree to which an organization strategically engages volunteer time and skills for mission delivery
- Identifies strengths and areas of opportunity for volunteer culture and capacity building
- Serves as a learning tool to expand and deepen community and volunteer engagement
- Creates a comprehensive custom report of the organization with prioritized suggestions for improvement

The Process (What to Expect)

- Complete a brief application (30 minutes)
- Attend a guided orientation to prepare your team (1 hour)
- Identify a cross-functional team of 5-10 participants
- Complete the Diagnostic (20-30 minutes per participant)
- Participate in a facilitated debrief to review findings and opportunities (2 hours)
- Receive customized recommendations, action steps, and resources to strengthen engagement and impact

Create Your Plan

- Podcasts
- Webinars
- Consultants
- Certification
- Book Clubs
- CVA Study Groups
- Associations
- Books



Act on the Plan

What is 1 thing I can do tomorrow to act on this plan?



**According to
dictionary.com**

Due regard for the
feelings, wishes, rights,
or traditions of others.



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ARETHA FRANKLIN
RESPECT



What does respect mean to you?

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**Volunteers,
coworkers and our
community have
the same pet
peeves that we do.**

**Same desire of
respect that we
have.**



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If you don't already think so, begin to think of volunteers, community and coworkers as PARTNERS, PEOPLE, who are helping you to move the mission of the organization

UBUNTU

I Am Because We Are

We are human only
through the **humanity**
of others; that if we
are to accomplish
anything in this world it
will in **equal measure**
be due to the **work**
and achievement of
others.





Thread Respect Through Everything You Do



THANK YOU!!!!



designedToLead



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@nicolersmithnet



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Breakout Sessions

10:15 AM – 12:20 PM

Group A

Whitney

Group B

Banneker

Group C

Wright

Running a CEC- Standard Component

Will Webber, Senior Manager, Component Services &
Brannan Meyers, Director, Component Services

Meet Your Component Services Team



- **Gennith Johnson**
- **Brannan Meyers**
- **Will Webber**
- **Christina Fligner**

Chief Engagement Officer
Division Support
Unit Support
Chapter Support

You are never operating alone!

Why This Matters

NEW! Component Health Assessment

Every component is scored

- 7 categories
- 100 points total

Goal isn't to penalize —
it's to spot strengths and
target support.

How Scores are Rated

Green

(Healthy/Thriving)

66-100 pts

Yellow

(Developing/Needs
Attention)

41-65 pts

Red

(At Risk/Needs
Support)

Below 40 pts

The 7 Categories at a Glance

Category	Possible Points
Policy	10
Membership Stability & Growth	25
Reporting & Governance Compliance	12
Financial Health	8
Leadership Infrastructure	10
Program Activity	20
Communications & Visibility	15

Membership Stability & Growth (25 pts)

- **Is membership stable or growing?** (10 pts)  Pull your membership report and have an Excel/Google Spreadsheet tracker
- **Is your retention rate at or above the CEC average?** (5 pts)  Welcome new members and build community; personally reach out to expiring/lapsing members
- **Is your 3-year trend positive?** (5 pts)  Tracking membership quarterly over several years
- **Are you running recruitment/retention activities?** (5 pts)  Promo codes at events, awareness campaigns, personal outreach, etc.

Program Activity (20 pts)

- **Do you host an annual event?** (4 pts) → Event Swag Starter Kit, Walk-In Slides, planning templates, etc.
- **At least one engagement opportunity every quarter** (8 pts) → PD session, book club, coffee chat, meetup
- **Do you recognize member contributions annually?** (4 pts) → Awards, scholarships, volunteer or student recognition
- **Ongoing member resources** (4 pts) → Newsletter, toolkit, journal, position statement

Where this lives

exceptionalchildren.org/component-leader-hub



Hub, designed to make your role easier

Continuing Collaboration

- **UNITS:** Quarterly Leader Gatherings
- **DIVISIONS:** DRC-Initiated Town Halls
- IDC Grants
- Monthly Snapshots
- CECommunities:
 - Division Leadership
 - Unit Leadership
 - CAN Coordinator



Top 6 Reminders

- Leader/Board Updates
- Event Support
- Websites
- Personal outreach to members
- Submit board updates
 - Quarterly list required!
- Volunteer Square

Managed Services

"Only a few of our Divisions and Units have staff to support them, and in many cases, that means the operational burden falls to a volunteer who already has a very busy professional life," "Our strongest Divisions and Units have made that staffing investment to build a strong operational footing, and Managed Services makes that affordable for them."

- CEC Chief Executive Officer, Chad Rummel

Other examples of CEC's Managed Services have included:

- **Teacher Education Division (TED):** executive leadership, accounting, membership development, conference planning, committee support, strategic planning
- **Complex and Chronic Conditions (CCC):** Strategic planning
- **Indiana CEC:** Conference planning, new teacher support through the Unit's partnership with the Indiana DOE
- **Michigan CEC:** executive leadership, accounting, membership development, conference planning, committee support, strategic planning
- **Michigan Association of Administrators of Special Education (MAASE):** administrative support, accounting, communication support, and membership support
- **National Association of State Directors of Special Education (NASDSE):** Conference planning

What Might This Look Like?

- Create member campaigns
- Assist in sending emails
- Detailed analysis
- Membership strategic planning
- Membership surveys
- Manage onboarding of new members
- Meeting planning
- Event registration
- Event marketing
- Communications/Marketing Plan
- Graphic Design
- Plan and launch communications campaign

Ongoing

- Administrative support
- Executive leadership

Project Based

- Board Training
- Strategic Planning



Contact Us!

Team:

components@exceptionalchildren.org

- **Brannan:** bmeyers@exceptionalchildren.org
- **Will:** wwebber@exceptionalchildren.org
- **Gennith:** gjonhson@exceptionalchildren.org
- **Christina:** cfligner@exceptionalchildren.org

Leadership Institute: Policy at the Local Level

Kuna Tavalin,
CEC Senior Policy and Advocacy Advisor
July 23, 2026

Agenda

- CAN Coordinator: CEC's Unit/Division Advocates
- CEC's Policy and Advocacy Resources
- Strategies for Unit/Division Work
- Q&A/Discussion

CAN Coordinator: Job Description

Position: CAN Coordinator

Estimated Time Commitment: 1-2 hours per month

Summary: Children and Youth Action Network (CAN) Coordinators are CEC members selected by their respective units or divisions. CAN Coordinators must be committed to advancing CEC's policies through effective grassroots advocacy.

CAN Coordinator Responsibilities

- Development of an effective network of advocates at the state and local level
- Regular communication with the network including circulation of CEC's weekly policy newsletter Policy Insider
- Activation of the network for CEC calls to action via our online letter-writing campaign tool, the Legislative Action Center
- Attendance and participation in CEC policy and advocacy webinars
- Attendance at CAN meetings offered monthly and meet-up at the annual convention, if in attendance

CAN Coordinator Qualifications

Must be a member of CEC Unit/Division and:

- Knowledge of or the strong interest in policy and advocacy
- A commitment to the policy priorities of CEC, as articulated through CEC's position statements
- A willingness to devote the necessary time to carry out all responsibilities related to this position

Advocacy in Washington, DC:

- *CEC encourages CAN Coordinators to attend/lead state teams at the Special Education Legislative Summit, an annual advocacy event for special educators which includes a two-day training, culminating with meetings with lawmakers on Capitol Hill.*

CEC Resources for Units/Divisions

- Legislative Action Center and Take Action
- Policy Insider
- Policy/advocacy webinars
- Special Education Legislative Summit
- Monthly CAN Coordinator meetings
- CEC position statements
- Individualized support as needed...

Ways to Advocate Locally: Issue Advocacy

Issue: Kentucky Voucher Amendment

Proposed constitutional amendment that would allow the General Assembly to provide financial support for the education of students outside the system of common schools.

- Implications for seven other sections of Kentucky's constitution
- School choice & School vouchers
- Negative impact on students with disabilities (CEC Position Statement)
 - Funding
 - Access
 - Loss of legal protections

KY CEC Plan of Action

Action:

Leverage social media to inform how Amendment 2 could negatively impact students with disabilities

Collaboration with KY CAN Coordinator:

- Sought advice and resources from CEC
 - CEC Position Statement
 - National Coalition for Public Schools
- Drafted social media images
- Sought feedback from CEC
- Revisions made; posts shared!



Ways to Advocate Locally: Lawmaker Engagement

Opportunity: Engage with Lawmakers at Michigan CEC Conference

Every two years, Michigan CEC's CAN Coordinator hosts a listening session with lawmakers and conference participants to discuss current issues facing special educators in the state.

- CAN Coordinator invites state and federal lawmakers to attend listening session
- Listening session begins with CEC priorities
- Legislators and selected participants are afforded the opportunity to speak on special education topics
- The event ends with networking between lawmakers and conference attendees

**Questions?
Thoughts?**

Please feel free to contact me!

ktavalin@exceptionalchildren.org



The Art of *Effective* Delegation

Nicole R. Smith, CVA

What is delegation & Why delegate?

If it is so great, why don't we do it?

Benefits of Delegation

Common misconceptions about volunteers and interns

When, How and what to Delegate

Professional Development Resources

Book Recommendations





Delegation

Delegation is the shifting of responsibility and authority for certain tasks from one person to another. A manager or supervisor can divide tasks and allocate them to those who report to them, including volunteers and interns, allowing leaders to instead focus on mission critical tasks.



No!

What it is NOT

- Avoiding projects
- Blaming others for poor results
- Giving tasks that are not realistic for time frame, available time, and skills of volunteer
- Relinquish control of results
- Abdicating - failure to fulfill a responsibility

Why Delegate?

- Saves time in long run
- Leadership development of you and volunteers
- Inclusive of new ideas, methods, improvements
- Helps you focus on mission critical tasks

Benefits of Effective Delegation

- Creates capacity
- Further the reach and impact
- Builds self-confidence in the person receiving the task
- Another way that volunteers and/or interns feel they are contributing to the organization; Builds community
- Develops and/or improves management skills





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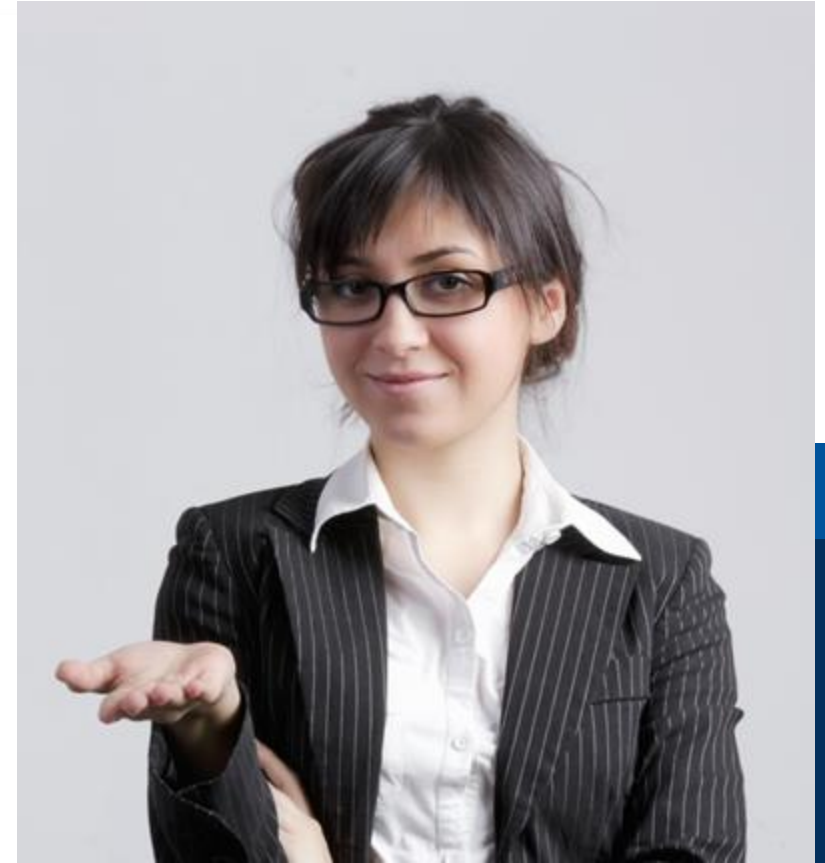
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Delegating to Volunteers and/or Interns



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-  Seamlessly embed your favorite Menti slide without changing windows.
-  Edit and more on Mentimeter.com and sync in real-time.





Volunteers and Interns

- They think they know everything
- They are unreliable
- They aren't very smart
- They won't help for free (Interns)
- They are not coachable
- They are terrible with technology
- They are old and crabby and complain about everything
- Volunteers are "less than" in some way
- Interns are entitled and are afraid of hard work
- They are lazy
- They are just sitting around anxiously awaiting us to call them to help with something
- Only volunteer because they have nothing else better to do
- They are unskilled
- They are not vital to the organization
- They don't understand confidentiality
- Volunteer retention doesn't require everyone's effort
- Shoddy work quality

**If You
Want to
Grow...**



**YOU GOTTA
LET GO**



How To Delegate

Effectively

1

Know
When to
Delegate

2

Know
What to
Delegate

3

Select right
person or
technology

4

Explain
your
reasoning

5

Give Detailed
Instructions

6

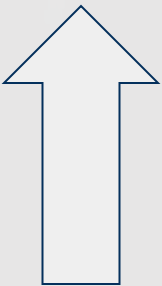
Set clear
expectations

7

Check In
Regularly

8

Conduct
project
overview



To Delegate

or

Not to Delegate:

That is the

Question



Keep The Project When

But Delegate If....

It takes longer to explain than to complete

It's a skill an employee needs (or a volunteer wants) to learn and benefits the org in the bigger picture

It must be done a specific way

There is more than one way it can get accomplished

There is a tight deadline

The deadline is flexible or there is a lot of lead time

The skillset is your strength

The skillset isn't your strength

What else?

What else?

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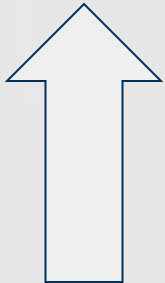
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What to delegate?

- Repetitive tasks
- One time projects
- Special skill set required -
accountant to help
pro bono



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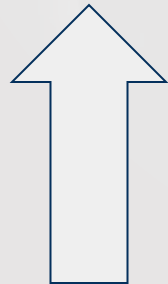
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Evaluate Your Mindset / Bias Check

**Inclusion
includes your
mindset
towards any
category of
people
Including
*Volunteers***

**Think of volunteers as
your supporters.
How you treat them as
people shouldn't
change,
the amount and type of
tasks support you are
asking of them should.**

Tap into what skills/connections they may have that can augment your organization. Compare the skills volunteers have to the needs you have

Volunteers

Doctors

Teachers

Flight Attendants

Government Workers

Law Enforcement

Corporate Trainers

Lawyers

Runners

Interns

Pre-Laws

Chemistry

Marketing

Accounting

HR

Hospitality

Education



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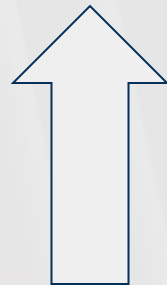
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Why does this task/project matter?

- **What or who will be impacted by completed this task?**
- **What will be accomplished by this project?**
- **How does it support the mission?**

How Can We Increase the Chances of Reliability?

- What skill set does the volunteer need to have to do the task? If specialized, ask for examples from their past.



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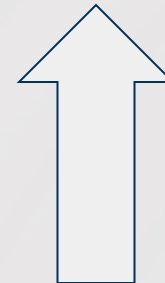
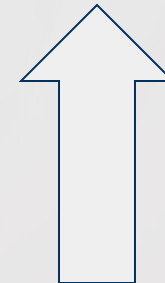
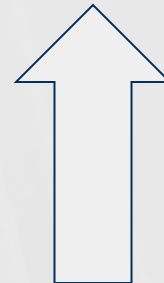
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When delegating:

- **Keep your word.**
- **Ask what questions they have.**
- **Weave their contributions into the organization.**



Clear Communication

- Are there any restrictions or boundaries on making it happen?
- Start date? When due? Do they need to be available specific times?
- Do they need log in credentials, or access to files, cabinets, spaces, etc.
- Ask them to repeat back to you the end result.
- Inform them about the impact
 - Tracking hours – showing how much time has been dedicated
 - Sharing examples of stories and results that have happened as a direct result of their help (newsletter)



Care

- Ensure suitable conditions
- Be considerate of their time
- Feedback – Give and Receive
- Check in at beginning a few days/weeks into it, and regularly
- Do they have the resources they need to complete the task?
- Do they need anything? What is progress so far? Are they on target?
- Need encouragement?
- Change of direction? Any roadblocks or challenges?





+



**These build trust which is the foundation of
reliability**

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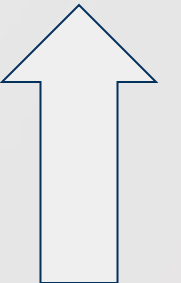
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- **Spotlight their accomplishments in team meetings**
- **Spotlight their accomplishment in local and/or national newsletter**
- **Invite them to community meetings**
- **Include them in event invites**
- **Company Events (as appropriate)**
- **Team wide Celebrations**
- **Team meetings (interns)**
 - **Huddles**
 - **Coffee Connections**





What Happens If It Doesn't Work?

- **Talk to the person to get an understanding**
 - **Start With Something You Appreciate**
 - **Reiterate What You Were Looking for and Why**
 - **Ask for Ideas for Changes**
 - **Ask What Feels the Most Challenging**
- **Give it Another Go**
- **Follow up on project**
- **Praise, Guide, or Reassign**

What Happens If You are Delegated *TO*?

Effective delegation goes both ways. If someone gives you a task, make sure to ask these questions to ensure you understand the assignment.

- When is it due?
- How much creative liberty do I have?
- What resources are there availability
- Is there training I may need to help accomplish this task



How Do You Delegate A Project to Someone?



ROLEPLAY

Delegate a Volunteer Social Activity

What Happens When You Are Delegated To?



R O L E P L A Y

**You Have Just Been Given The Task To
Complete An Annual Report**

Resources

5 must-read books to make delegating at work easier



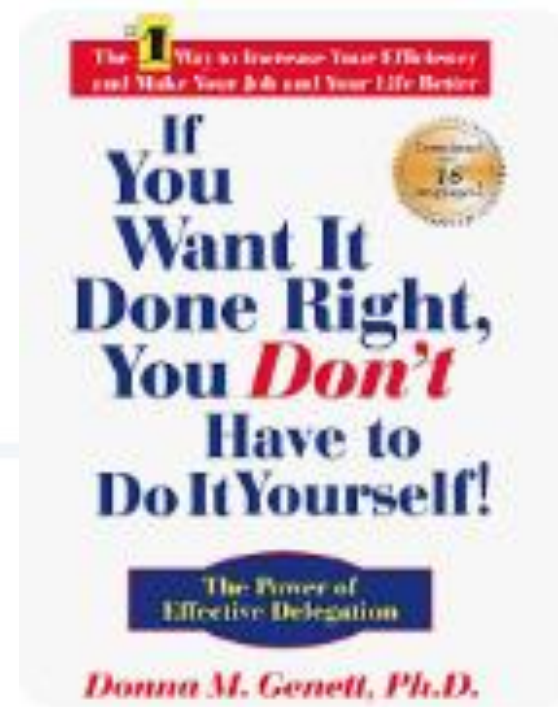
Effective Delegation: Are You Delegating or Dumping?



Effective Delegation: Are You Delegating or Dumping?

Skilled and effective delegation is an art that most managers I've known, including myself, haven't mastered yet. In the harried rush to meet deadlines, respond to email, return phone calls, and handle crises, we try to communicate the best we can, cross our fingers, and then rush off to the next thing. But is this most effective tactic in the long run? Probably not — not with our paid staff and certainly not with our volunteers.

LinkedIn Learning interface showing a course titled "Delegating Tasks" by Beth Gould Clark. The course is 5.77 hours long and has 15 modules. The contents list includes: Introduction, 1. The Delegation Mindset, 2. Options for Delegating, 3. The Mechanics of Delegation, and 4. Letting go of delegation.



12 Steps to Effectively Accepting Delegation



"Hi, my name is _____, and I am a recovering *delegatee*." It has been said the definition of insanity is doing the same thing over and over and over expecting different results. So why is it we are so insistent on approaching the task of delegation in the same old manner?

Effective managers delegate tasks to others so they may focus on other concerns as well as to help develop those around them. But when learning about delegation, too often, we focus only on the "delegator" and not the "delegatee."

Here are the 12 Steps (components) to the process of most delegations and a set of questions you might consider asking when a task is given to you to increase your chances of successfully completing the task:

1. **The context of the assignment** – "Could you please tell me what you are going to do with this when I get it done, tell me who is it for, and where does it fit with other things going on?"
2. **Deadline** – "When would you like it, and when is it really due?"
3. **Scope** – "Would you like me to do the thorough job and take a little longer, or the quick and dirty version?"
4. **Format** – "How would you like to see the output of my work presented? What would make your life easier?"
5. **Time budget** – "Roughly, how long would you expect this to take (so I can tell whether I'm on track or not)?"
6. **Relative priority** – "What's the importance of this task relative to the other things you have asked me to do?"
7. **Available resources** – "Is there anything available to help me get the job done? For example, have we done one of these before?"
8. **Success criteria** – "How will the work be judged? Is it more important to be fast, cheap or perfect?"



THANK YOU!!!!



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Questions?

BIO BREAK

Leader Collaboration

“Worst Idea” Reverse Brainstorm

Go big. Get honest. Flip it around.

What We're Doing

- Instead of asking for your best ideas, we're asking for your worst ones — then flipping them.
 - **Brainstorm the worst idea** — Tables imagine the absolute worst way to handle a real component challenge.
 - **Flip it** — Every worst idea gets flipped into its opposite — an instant best-practices list.
 - **Make it personal** — Each person picks one insight and turns it into a one-sentence commitment.

Why This Works

It's a lot easier to spot a bad idea than to invent a good one from a blank page.

- **Honesty comes faster** — Naming what would ruin a component is easier — and more candid — than pitching a perfect plan.
- **The list writes itself** — Every worst idea flips directly into a practical, group-generated best practice.
- **Ownership sticks** — Because the group built the list, it lands as their own conclusion, not a rule handed down.

Example: Communications

Prompt: *"How would you guarantee your newsletter never gets read?"*

- **Worst idea:** Send it from an address nobody recognizes. Bury the one important date in the fifth paragraph. Never send a reminder.
- **The flip:** Send from a name people know. Put the key date in the first line. Follow up a few days before it actually matters.

Step 1: Brainstorm the Worst Ideas

8 minutes · As a table, write down every terrible idea you can

- **No idea is too extreme** — The more outrageous, the better — that's the point.
- **Don't stop to debate** — Keep writing. Realism comes later, not now.
- **Don't self-censor** — If it makes the table laugh, write it down.

Step 2: Flip It

5 minutes · Turn every worst idea into its opposite

- Example: *"Never say thank you."* → *"Build in a regular way to recognize members."*
- **What's left is a real best-practices list — and you wrote it yourselves.**

Step 3: Table Report-Outs

2–3 minutes per table

One favorite worst idea. One flip. That's it.

Step 4: Your Reverse Insight

3–4 minutes Individually

- Find one flip that's actually true in your component right now.

Starting next month, I will ___ instead.”

- Add this sentence to your action plan.



Jose Maquen
Operations Manager
25 Years of Service



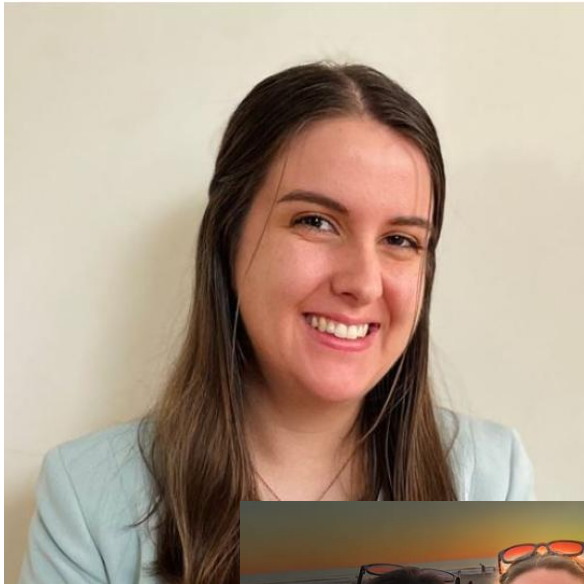
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