



Reimagining CASE 2017–2021

Council for Advancement and Support of Education

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Introduction

For more than 40 years, the Council for Advancement and Support of Education (CASE) has been a trusted partner for those who seek to advance education. In that time, as the world's understanding of education as a powerful means of transforming society has both deepened and broadened, so, too, have our ranks. Today, CASE has a membership of 3,690 institutions, located in 82 different countries, and provides valuable services to 85,325 professionals working in alumni relations, advancement services, communications, fundraising and marketing.

While these numbers serve as compelling evidence of our work's value, they also indicate the expansion of the sector. In every corner of the globe, our members are doing everything in their power to increase the accessibility, efficiency and impact of education upon the world's citizenry. So, too, must we do everything in our power to bolster and sustain our capacity to serve our members. It is critical that we look to the future and set out a strategic plan for meeting the challenges ahead while staying true to our rich and expansive past.

A wise colleague once shared the view that the strategic planning process was as important as the outcome. So as we set out to reimagine our future, we took great care to involve our membership and partners. For at the heart of CASE are its people: staff, volunteers, members and stakeholders. Our staff around the world demonstrates day in and day out a high degree of professionalism, camaraderie and dedication to our mission. CASE's very existence is built upon the love and commitment of our volunteers (some 4,000 each year) who give of their time, their expertise and their passion for education. Volunteers ably lead our governing boards, our districts and our communities of practice. Volunteers help us identify challenges ahead for the profession as members of our commissions. Those volunteers spring forth from our member institutions, believe in our value and our desire to serve. We are fortunate to have more than 150 educational partners, including companies and consultancies that provide vital support to the work of our members and of CASE. We have enthusiastically sought collaboration from all of our constituencies, and we are delighted to report that all responded with equal enthusiasm.

The thousands who participated in this process hail from around the world and every profession we represent. While different groups brought different

perspectives to the undertaking, we are gratified by the powerful level of engagement and the degree of alignment that the process revealed—clear evidence, we believe, of the soundness of our path forward.

Set out in this plan is our new vision, mission and values, together with our key goals and myriad objectives for the next five years. We have dreamed large and been encouraged to be bold and bodacious. Yet what we are proposing is evolution rather than revolution; for we are determined to meet the needs of an ever-changing future by remaining true to our successful past.

Our Vision for CASE

No strategic planning process can begin without an attempt to answer a simple, yet profound, question: Why do we do what we do? We have focused on this question throughout this plan's development. Our new vision statement, "*CASE advances education to transform lives and society,*" answers that question and frames the sense of purpose, direction, drive and mission that motivate us.

In order to advance education in the future as well as we have in the past, we will concentrate our efforts in four main areas: member engagement, talent management, thought leadership and global impact.

Member Engagement

Because our members are at the core of everything we do, supporting them will continue to be a priority for a reimagined CASE. We will redouble our efforts to serve members in appropriate and meaningful ways, no matter where they are in the world or in the profession. This will require our unflinching devotion to continually assessing our curriculum, the methods by which it is delivered and the value it offers. At the same time, we will seek every opportunity to improve the member experience by forging new global partnerships and ensuring that every CASE staff member understands and honors the special trust our members and the institutions they serve have placed in us.

Talent Management

We will also heighten awareness of the critical nature of our communities of professional practice. This will include broadening the pathways by which professionals can enter these fields and providing them with robust offerings that will enable them to grow and excel. And we will continue to convene committed professionals from across the globe to share, network, inspire and introduce lifelong mentors and peers.

Thought Leadership

As the largest and most widely relied-upon association serving professionals advancing education worldwide, we are in a strong position to establish CASE as a thought leader in the field. To do so, we will strategically direct our resources to uncover new knowledge, shed light on trends affecting our member institutions, and work with others to apply that knowledge in ways that demonstrate the value of the profession.

Global Impact

Finally, our plan for a reimagined CASE is to establish a truly global position and more clearly transmit the value of such a position to volunteers, members, staff and stakeholders. By so doing, we will enhance not only our capacity to serve a broader and more representative membership but also better equip them to work with other entities around the world to advance our shared purpose: the transformation of lives and society through education.

While our goals and objectives are structured around these four areas, the process of articulating them has made one thing clear: Achieving them will demand unprecedented levels of integration and harmony. If we intend, for example, to become a leading voice in the international dialogue regarding the power of education, we cannot do so without a deeper and more capacious understanding of our global identity and how that identity must reflect the broad range of our members' needs. And if we are to offer an even more member-focused curriculum, then we must do so from multiple perspectives—that of newcomers to the field, as well as senior leaders; that of traditional professional classes, as well as more diverse and emerging professionals. These opportunities for integration have manifested themselves as strikingly similar goals that appear in different areas throughout the plan. They are signs of an organization poised to move in a powerful and coordinated way across a wide spectrum of services.

We are grateful for the involvement of more than 1,000 participants in strategic planning sessions and more than 1,500 members who responded to our survey, and as we strive to achieve our goals, we will remain indebted to each and every one. We are also thankful to CASE staff members, who have contributed significantly to our strategic planning process and have helped shape, and will own, the outcomes of this plan. An impressive steering committee has led our planning process, with representatives from six continents and from every type of institution among CASE members. Every one of our dedicated

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district and international boards has provided vital contributions. We also benefitted from the professional expertise of RJ Valentino, Janis Johnson and their colleagues at the Napa Group. Last, but not least, we would like to acknowledge our remarkable Board of Trustees who have approved this plan and thereby blown wind into our sails as we venture forth to an exciting future.

You, our members, many of you magnificent volunteers, will be key to realizing the success of this plan. That is why it was so vital that you played a part in creating it.

We look forward to an important and inspiring journey together.



Sue Cunningham
President and CEO
CASE



Mike Goodwin
Chair
CASE Board of Trustees

Our Plan in Context

Education is an essential component of the fabric of every nation and culture, and its complex issues affect CASE's global constituencies. As CASE develops a new paradigm for advancing education, we must do so with several key precepts in mind:

The compelling need for strategic talent management, which will strengthen our member institutions' capacity to position education as vital to both professional and personal well-being as well as to sustaining the economic growth of nations, states and communities

The challenge of declining resources for educational institutions, with tighter budgets driving higher expectations of philanthropic support and broader use of volunteers

The reality of continually changing markets—varied educational models globally; increasingly diversified populations of traditional and nontraditional students; sustained growth in distance learning, learning platforms and formats, and alternative partnerships (such as universities/community colleges, postsecondary/K–12, educational institutions/businesses); and the growing demand for educational experiences that suit the needs of the individual

The constant drive for new technologies to support generational shifts in the workforce and student populations and to provide current, on-demand communication tools to connect people, curriculum and services and to drive relationship-building

The demand for thought leadership to advance institutional strategy—knowledge, research, information, resources and tools

The force of an integrated enterprise for fundraising, alumni relations, communications and marketing professionals in education

These emerging trends are taking shape against a backdrop of dynamic demographic changes that will have a profound effect on educational institutions everywhere. Forecasts project that higher education enrollment around the globe will have more than doubled to 262 million between 2012 and 2025. Nearly all of this growth will be in the developing world, with

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Our Plan in Context

continued

more than half in China and India alone. Other high-growth nations include Brazil, Indonesia, Iran, South Korea and Turkey. According to predictions by the United Nations, India will account for 25 percent of the world's 18- to 22-year-olds by 2020.

Across the world, at all levels, however, educational institutions and professionals are seeking to strengthen the value proposition for education, both public and private. To fulfill their missions and meet both individual and societal needs, colleges, universities and independent schools rely on—and therefore must foster—the goodwill, active involvement, informed advocacy and enduring support of faculty, staff, students, alumni, donors, prospective students, parents, government officials, community leaders, corporate executives, foundation officers and other constituencies. Already, many Asian nations are shaping global models that strategically link higher education with business.

These realities offer up extraordinary opportunities for CASE and have provided the platform for a thoughtful, global strategic planning process to reimagine our important role in advancing education in changing times.

Making Our CASE in a Changing World

By
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Governments are changing how they support education. Technology is changing how students learn and institutions communicate. And the globalization of everything is putting economic forces into play that will force institutional leaders to plan for new marketplace realities. Ready or not, the entire education industry is finding itself in the midst of a major “sea change.”

Some institutions have been making technology-driven changes, dealing with government disappointments, and responding to international trends for a long time. Although others are recognizing the need to adapt, many institutions remain locked in a local or regional mindset. As a consequence, they risk missing new opportunities to strengthen their organization and advance their educational mission.

Every academic institution and organization will likely be changed one way or another by globalization. Fundraising, branding, marketing and communication will change. Alumni and government relations will change. Student and faculty migration and behavior patterns will change. Curricula across the board will change. Programs will adapt. And as is always the case with change, institutions and individuals will experience both the pain and joy of new opportunities.

The reality for those whose professions advance education is that a high degree of sophistication and understanding of industry issues and societal trends will be required to meet these challenges. But there is also some really good news. Those who prepare themselves well for change inevitably will find new opportunities for leadership in this rapidly evolving multi-dimensional world.

When you really think about it, the advancement and support of education will depend even more on our ability to respond to competitive challenges and operate in a global context: Finding new money; using alumni and students to open operations in new places; adapting branding and marketing initiatives to global marketplace realities; and building relationships with unfamiliar foreign governments and organizations. All of this will require a very high degree of professional sophistication and

understanding of the many difficult issues. Those who fully understand the issues, embrace the change and rethink their methodologies will find incredible new opportunities coming their way.

Changing Government Roles

Some governments are going through overall “austerity” cutbacks. Others are focused mostly on making a few of their institutions “world class.” Some seem more interested in research prominence than in teaching while others are more interested in creating and filling jobs.

Government intervention and intrusion is both ongoing and unpredictable, with the education industry under increased scrutiny and, in some cases, under political assault. Complaints about cost, student debt, spending on frills, and concerns about learning outcomes are motivating legislators and politicians to promise voters that they will “fix” things. Fundraising practices, charitable giving laws and endowment spending also are increasingly under the governmental microscope. Amid a seemingly hopeless atmosphere of extreme polarization, any “fixes” will require savvy collaboration and compromise. In the end, experienced professionals in government affairs who are innovative enough to successfully navigate these turbulent waters will find amazing new opportunities in this new and emerging global industry.

Globalization of Everything

Anyone with a laptop and the knowledge to use it can build relationships and compete from anywhere in the world. Even the smallest businesses utilizing digital technology can find customers in other parts of the world. As a result, the economy is becoming global, more people are traveling internationally and, for all practical purposes, the world is shrinking.

On the one hand, cross-cultural engagements are all good. But on the other, they will change the competitive environment. The digital technology revolution has already changed how institutions communicate. Social media have added new platforms. Websites have become portals that enable every constituent from student prospects to older alumni to find new and continuing educational opportunities, athletic and cultural events, conferences and lectures, and communities of interest of all types.

Making Our CASE in a Changing World

continued

In addition, online degree and certificate programs are opening up new convenience-motivated markets. Constant technology improvements and creative uses of occasional on-site meetings and conversations are making online education a permanent and competitive alternative to campus-based learning.

Technology and the students brought up on it are also changing the campus-based learning experience. Students would rather search the internet for information and answers than read long, dry textbooks and journal articles. Skype and other software programs enable experts from anywhere in the world to dialogue with students and professors. Lecture classes are passé. Students instead want professors who present their ideas creatively—and briefly, à la the popular “Ted Talks.” (Those professors who don’t adapt risk skewering online through “rate my professor” websites.) And, of course, there are volumes of video and other media resources to further enrich the total experience.

Marketing and communication professionals will need to adjust brand identities, websites, program descriptions and social media platforms for a global audience; help constituents adapt to the coming changes and embrace digital media; and then seize opportunities to help lead the way.

Becoming a Global Industry

Globalization usually begins with study abroad, progresses toward institutional partnerships, and then sometimes grows into establishing offices or even campuses in other countries. Early planning often involves exploring these and other opportunities in areas with larger numbers of foreign alumni and/or parents of foreign students.

Some institutions are already locating offices in other countries to raise money from their alumni, recruit new students and find corporate and foundation partners with global interests. This emerging global education industry will eventually feature many truly international institutions that have organized to communicate their location advantages, language opportunities, cultural attractions, cost competitiveness and job opportunities.

The most exciting potential of a full-blown global higher education industry is to produce truly international leaders in cross-cultural settings and to focus research and consulting expertise on solving the world’s most critical

problems. Just think about the power of institutions working together to address issues, including energy, global warming, conservation, poverty, hunger, water, public health—even rebuilding institutions in war-torn areas. We have an opportunity to bring new meaning to the phrase, “Knowledge is power.”

Seizing the Opportunities

Determining your professional place in this new global industry will require a firm grasp of the issues and a sophisticated application of expertise. But make no mistake; when planning and working together, fundraising, marketing and communications, alumni relations and government affairs professionals are better suited than any others in the academy to help prepare constituents, find the necessary resources, use digital platforms both inside and out, adapt strategic communication and marketing to compete internationally, deal with new government realities, and help lead the way.

This strategic plan, with its revitalized mission to “inspire, challenge and equip communities of professionals to act effectively and with integrity to champion the success of their institutions” in order to “advance education to transform lives and society,” positions CASE and its professionals perfectly to seize new and exciting opportunities to lead.

Larry D. Lauer (larrydlauer.com) is one of CASE’s most active and honored volunteers. Among his many leadership roles, he served for seven years on the CASE Board of Trustees. In 2012 he received the Frank L. Ashmore Award for service to CASE and the advancement profession for a lifetime of professional service and his pioneering of the integrated approach to marketing the academy. In 2012 he also received the CASE Crystal Apple Award for excellence in teaching. Lauer also is the only person ever to receive CASE’s Alice L. Beeman Award for Research in Communication twice.

Vision, Mission and Values

Vision

Advancing education to transform lives and society.

Mission

As a catalyst for advancing education worldwide, we inspire, challenge and equip communities of professionals to act effectively and with integrity to champion the success of their institutions.

Values

We value professional excellence, integrity and respect for our community of volunteers and staff as partners, stakeholders and leaders. We aspire to be bold, agile and innovative. And we are committed, in all that we do, to be collaborative, inclusive and embracing of diversity.

Strategic Goals and Objectives

Member Engagement

GOAL

CASE will ensure member loyalty and engagement by providing exceptional value, quality service and expanded opportunities.

OBJECTIVES

- Segment and target activities and communications to create a personal CASE member experience and to strengthen a greater sense of community.
- Forge new and strengthen existing partnerships to improve services, products and opportunities for members.
- Increase member and volunteer satisfaction, engagement and stewardship.
- Facilitate greater integration within CASE to ensure that staff understand and embrace their roles in delivering a consistent CASE brand experience.

Talent Management

GOAL

CASE will be the leading global resource for professional development for an expanding, highly talented, diverse workforce framed by a professional lifecycle, a common curriculum and consistency of delivery.

OBJECTIVES

- Address the growing need for a pipeline of professionals advancing education by creating and expanding awareness of the professions as attractive career opportunities.
- Develop the professions using a lifecycle model (entry, mid-level, management, leadership) that responds to the changing career path needs of members.
- Respond to the challenge of diversifying the community of professionals advancing education by developing services that enable institutions to recruit and retain professionals of diverse backgrounds.
- Enhance CASE talent development to ensure staff engagement and organizational achievement of goals and priorities.

Thought Leadership

GOAL

CASE will be the leading voice on issues of interest to education leaders and professionals whose work advances their institutions.

OBJECTIVES

- Serve as a primary resource for data and benchmarking.
- Serve as a primary resource for original research.
- Serve as the leading source for expertise and best practice identification and dissemination.
- Advocate on behalf of those working to advance education and on behalf of issues important to their institutions.

Global Impact

GOAL

CASE will play a pivotal role in advancing education globally by engaging with key stakeholders to build educational capacity, impact and success across the world.

OBJECTIVES

- Demonstrate the benefits of global engagement and champion a CASE mindset that supports and informs all CASE work.
- Engage proactively with partners who have a global footprint to develop, deliver and support work that will have the greatest impact.
- Grow membership globally.
- Develop greater and deeper worldwide opportunities for senior volunteers to help build educational capacity, impact and success.

First Steps Forward

As laid out in the pages that follow, our strategic plan will establish a trajectory that will carry CASE through 2021 and beyond. The tactics section in the appendices provides much greater detail in this regard. While the plan involves significant evolution over a five-year roll out period, we are mindful of the need to make immediate progress in some key areas to send a clear signal to membership of our forward motion and to serve as an accelerant to our future plans. With that in mind, we've included here a number of objectives that we intend to achieve within the next 12–18 months.

Systemic challenges

While not reflected specifically in our goals and tactics, there are several systemic challenges that we must address in the very near future in order to bolster our capacity for moving ahead in the directions suggested by our plan:

- **We will review and refine our governance structure to better meet the needs of our membership.** This will be a central focus for a planned leadership congress in the spring of 2017.
- **We will retain an outside independent party to perform a comprehensive audit of our information systems and develop a strategy to improve those systems.** Following that audit, we will retain information systems counsel to guide us through those improvements and continuously assess our capabilities.
- **We will launch a business development unit to lead exploration and facilitate delivery of emerging business opportunities.** This unit will broaden our capacity to serve and uncover new and innovative streams of revenue as a means of financing other goals of the strategic plan in support of the membership. Some key initiatives under consideration include a data collection/benchmarking project, the establishment of a CASE consulting practice and the collection and publishing of alumni satisfaction benchmarking data.

Short-range goals

Member Engagement

- We will launch a new dynamic website that improves CASE's capacity to be forward-thinking, member-focused and encouraging of a greater sense of affiliation and loyalty. The website will be the beachhead for a more current and strategically oriented content strategy approach to our communications.
- We will create alliances with colleagues associations and potential partners to establish mutually beneficial relationships, create content and develop new activities and services.

Talent Management

- We will expand graduate trainee and internship opportunities with a specific focus on diversity to build a more robust pipeline for those interested in entering the professions. By 2017, we will increase the number of advancement interns in our U.S. program from 46 currently to 75.
- We will create a mechanism for competitive analysis of professional development opportunities. This will allow CASE to define core, niche and differentiated positioning opportunities.

Thought Leadership

- We will create a speakers' bureau comprising volunteers and senior staff in order to respond to media inquiries more effectively and establish higher visibility for CASE as a thought leader in the sector. We will also position the President as a leading spokesperson for the industry.
- We will solicit input from our membership and educational partners in order to define a comprehensive research strategy. We will seek to secure external funding to support the research agenda and expand our capacity to gather, interpret and share research findings.

Global Impact

- We will build upon the existing strength of the CASE Commissions by testing a regional commission model, beginning with the CASE Europe Annual Conference in 2016. This model will allow us to gain a broader perspective of horizon issues in every region we serve.
- We will launch an e-mentoring network which will harness the experience and skill of our senior volunteers in ways that will directly support and develop professional capacity in all CASE regions, particularly in emerging areas. This network will amplify the impact of our service in every corner of the sector, and ensure greater effectiveness of our member institutions.

Implementation

Every plan involves making choices. The hardest question to answer has been “What will we stop doing?” The first year of this plan will see us designing the operational plan to support our reimagined direction and to determine just that. We have heard many times on this journey that we cannot be all things to all people and do it well. Decisions have and will need to be made about what we need to focus on and what we need to let go.

Central to our implementation will be two over-arching “drivers”: technology, and governance and volunteer leadership. To that end, we will:

- **Reimagine CASE’s governance** to reflect and empower an effective global organization.
- **Develop a strategic technology plan** that identifies and delivers innovative technologies that support CASE’s strategic and operational goals and transform the CASE member experience.

Pending approval of this plan by the CASE Board of Trustees, a detailed five-year implementation plan will be developed in late 2016.

So what will it cost and how will we pay for it?

The strategic plan currently includes more than 60 tactics, and there are approximately 10 game-changers embedded in those tactics that have the potential to significantly impact the bottom line. There is real work to be done during the remainder of this calendar year to:

- Analyze and test market feasibility
- Write business plans for the game-changers
- Identify expense and revenue potentials moving forward
- Project long term ROI.

Management will come to the November 2016 board meeting with a comprehensive overview of the financial impact of the strategic plan as well as a proposal for funding. While some of the tactics can be funded by re-allocation of funds already approved in the FY17 budget, it is clear that there will need to be some additional investment drawing down from reserves in order to fully fund the plan.

Conclusion

The process of reimagining CASE is not to be taken lightly, particularly when we have a long and distinguished history of providing a remarkable degree of service and value to our members. That is why, throughout this process, we have taken great care to preserve the special things about CASE that have made that history possible.

We have, and will always, ground our work in the awareness that CASE is much more than a collection of staff members in offices around the globe. CASE is, in fact, a remarkable aggregate of staff, volunteers, individual members, member institutions and stakeholders from both within and without the profession who routinely share their best thinking and combine their efforts for mutual improvement. There can be little doubt that sustaining this incredible ecosystem is among our most important roles, and we can assure you that no matter how we might reimagine ourselves, our capacity to connect all those who care about advancing education will be at the core of what we do.

We have built that capacity because of our long history of being responsible stewards of our resources and of efficiently running our organization. These habits have allowed us to keep pace with the growth of the education sector without any diminishment in service, and we intend to exercise this same discipline as we expand our scope to meet an even broader need.

Finally, we will never lose sight of the fact that the achievement of our goals can only be counted as a success if it furthers the aims expressed by our vision: advancing education to transform lives and society. Our role as an indispensable partner for those who seek to improve the lives of all through the power of education has never been more important, and we will continue to serve in that capacity with the utmost degree of dedication, commitment and service.

Yet, if we seek to remain true to these principles, we must think boldly about how we do so in a dramatically changed environment. Our planning process has given us a comprehensive view of that environment, and the contributions of the many who are succeeding in these challenging times have provided us with a thoughtful and well-reasoned view of what a reimagined CASE must look like in the years ahead.

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Conclusion

continued

We approach the days ahead with confidence born of our distinguished history; our engaged, knowledgeable and generous partners; and the clear and demonstrable need for the direction and support that only we can provide. We are grateful and honored that you have chosen to join us on this journey.

Project Leadership

A specially formed steering committee of CASE worldwide staff and member volunteers guided the leadership-driven, yet inclusive, planning process and assumed major responsibility for developing the strategic plan's vision, mission, values, goals, objectives and action items. Along with the CASE Executive Leadership Team, they brought talents and perspectives from across the organization and contributed broad views from the stakeholder community.

Steering Committee

Chair

J. Michael Goodwin, President and CEO, Oregon State University Foundation and Chair of the CASE Board of Trustees

Members

Sue Cunningham, President and CEO, CASE

David Dini, Headmaster, St. Mark's School of Texas

Ian Edwards, Senior Partner, More Partnership

Teresa Flannery, Vice President for Communication, American University

Lisa Gibert, President and CEO, Clark College Foundation

Sergio Gonzalez, Senior Vice President for University Advancement and External Affairs, University of Miami

James Harris, President, University of San Diego

Robbee Kosak, President, Fannie & John Hertz Foundation

Dickson Lim, Director of Development, National University of Singapore

Kimberly Manning, Vice President for University Communications and Marketing, Rutgers University

Fritz Schroeder, Vice President, Development and Alumni Relations, Johns Hopkins University

Martin Shell, Vice President for Development, Stanford University

Emma Silva, Director of Advancement, United Nations International School of Hanoi

Lorna Somers, Vice President, McMaster Foundation and Director of Development, McMaster University

Jeffery Todd, Associate Vice President, Alumni & Executive Director, Alumni UBC, The University of British Columbia

Also participating with the steering committee

Brett Chambers, Vice President of Volunteer Relations, CASE

Don Falkenstein, Vice President of Business and Finance, CASE

Ed Groves, Senior Director of Educational Programs, CASE

Rob Henry, Vice President of Education, CASE

Tricia King, Vice President of International Operations, CASE

Ron Mattocks, Chief Operating Officer, CASE

Norma Walker, Vice President of Advancement Programs, CASE

Facilitating the planning project

The Napa Group of Novato, California, a national consulting firm specializing in strategy, leadership and organizational design for education, nonprofits and business.

APPENDIX B

Overview of the Strategic Planning Project

The year-long planning process convened at the July 2015 CASE Summit where leadership groups began discussing the possibilities, teasing out the “big ideas” and outlining the primary elements of CASE’s “why?” Five phases guided decisions and activities.

Process and Timeline

Phase 1: Visioning, Project Planning and Launch June–July 2015

Following affirmation of project outcomes and a comprehensive project plan by CASE executive leadership, the project launched officially at the CASE Summit in Chicago. Sessions with the CASE Board, Council of Alumni Association Executives (CAAE) Board and CASE 50 provided perspectives on several framing concepts for CASE’s vision, value proposition, opportunities, risks and strategic direction. Formation of the steering committee, a global stakeholder engagement framework and a project communications plan and website pages also began.

Phase 2: Draft Goal Development August–November 2015

Following the Chicago meetings, preparations began for the previously scheduled annual meetings—including CASE Europe (CEAC Conference) and other sessions in October in Washington, D.C., including the CASE Commissions, Institutionally Related Foundations and special meetings of CASE worldwide and D.C. headquarters staff. Providing a global perspective early in the process, the CEAC meeting in early September engaged European members, influencers and advocates early in the strategic planning project around their experiences and perspectives regarding CASE’s history, traditions and what’s important moving forward for CASE as a global organization. The steering committee held its first meeting on Sept. 28–29 in San Diego where draft visions, missions, values and strategic themes were developed to guide further engagement activities during the fall. Other stakeholder sessions occurred in October; cumulatively information and perspectives from these sessions were folded into the material informed constituent engagement during fall 2015.

APPENDIX B

continued

In November, the board and steering committee confirmed a strategic framework that would be tested by broader consultation among CASE volunteers and staff in the next phase. Timely communications updates about the project continued to CASE members, staff and other partners per the communications plan.

Phase 3: Assess, Build Out and Validate November 2015–February 2016

This phase activated six global task forces, committees of volunteers and staff co-chaired by steering committee members. They were assigned the following topics, which had emerged as critical strategic themes: thought leadership, talent management, member engagement, global scope, technology and governance. Task forces built out the goals and objectives, created narratives on the context and outcomes for specific goals, proposed essential tactics for implementation and offered other ideas to guide the plan's development. Additional engagement sessions continued with district boards. Activating these global engagement teams was seen as an opportunity to establish new practices for global interaction, decision making and community building.

Phase 4: Goals Fully Developed and Broad Stakeholder Engagement February–May 2016

The steering committee met March 10 to affirm draft strategic plan elements, followed by a board session that affirmed the emerging direction. This was followed by development of plan drafts and member and staff surveys for input and feedback.

Phase 5: Project Completed and Implementation Initiated May–June 2016

As the final plan was prepared for CASE Board approval in July and presentation to CASE members at the annual meeting, CASE's Executive Leadership Team developed a roadmap for implementation, designating the first 24-36 months as the timeline for conducting further research, scoping and planning for priority goals and objectives as part of designated implementation activities for the first five years. The concept of "adaptive implementation" will guide annual refreshing of the strategic plan against current or changing situations.

Broad Stakeholder Engagement

A global “engagement architecture” provided a variety of high-touch and high-tech opportunities for CASE members and staff worldwide to provide input to the project at defined intervals, which aligned largely with their meetings. These activities—face-to-face meetings, focus groups and electronic surveys—were led by the consultants, steering committee members and other CASE volunteers and staff. These groups included:

CASE’s international board	CASE Europe board and staff
Council of Alumni Association Executives	CASE Asia Pacific board/volunteers/staff
CASE 50	CASE District Chairs Council and District boards
CASE Europe Annual Conference	Community College Advisory Committee and community college presidents
National Committee for Institutionally Related Foundations	CASE-NAIS Conference
CASE worldwide vice presidents and directors	CASE Latin America Advisory Group
CASE Commissions	CASE independent schools members
CASE Industry Advisory Council	CASE Marketing Task Force
CASE headquarters staff	CASE members worldwide

Key Stakeholder Sessions for CASE’s Strategic Planning Project

Surveys

CASE Members
Worldwide –
Spring 2016

CASE staff –
Spring 2016

Face-to-face sessions facilitated by RJ Valentino [completed]

CASE International Board – July 11, Chicago
Council of Alumni Association Executives Board – July 11, Chicago
CASE 50 – July 12, Chicago
CASE Europe Conference – Sept. 1–2, U.K.
National Committee for Institutionally Related Foundations – Oct. 6, Washington, D.C.
CASE Worldwide directors and vice presidents – Oct. 6–7, Washington, D.C.
CASE Commissions – Oct. 20, Washington, D.C.
Industry Advisory Council (IAC) – Oct. 20, Washington, D.C.
CASE headquarters staff – Oct. 20, Washington, D.C.
CASE Europe Board – Oct. 22, U.K.
CASE Asia Pacific staff, volunteers and board – Dec. 1–2, Hong Kong

Face-to-face sessions facilitated by CASE staff/board members

District Boards/member focus groups
District I – Jan. 27, Boston
District II – Feb. 6, Philadelphia
District III – Feb. 13, Nashville
District IV – April 2, Dallas
District V – Feb. 14–15, Chicago
District VI – Jan. 11, Kansas City
District VII – June 2–3, San Diego
District VIII – Feb. 2, Calgary, Alberta
Community College Advisory Committee – Sept. 30, Anaheim
Community College presidents – Oct. 2, Anaheim
District Chairs Council – Jan. 7, Washington, D.C.
CAAE Winter Institute members – Feb. 15–16, Scottsdale, Arizona
América Latina Advisory Group – March 2, Mexico City