



Strategic Plan

Approved May 21, 2015

Strategic Planning Team Members 2014-15

Dan Armstrong
Chad Branum
Barbara Brown
Sam Farsaii
Adam Feind
Karen Fuller
Seth Hansen
Jeff Harris
Sandra Hayes
Frankie Jackson
John Orbaugh
Alice Owen
Venu Rao
Kevin Schwartz
Victor Valdez
Steve Young

Action Planning Team Members

Collaboration

Mignon Plyler – Chair
Tony Flores
Sandra Hayes
Rosa Ojeda
Alice Owen

Professional Learning

Joe Barnett – Chair
Barbara Brown
Frankie Jackson
Alfredo Loredó
Bill Lovelace
Myrna Martínez
Teri Ross
Candice Threadgill
Michelle Traylor

Advocacy

Lewis Wynn – Chair
Mark Gabehart
Albert Martínez
Bill Lovelace
Jennifer Miller
John Orbaugh
Jim Schul
Kellie Wilks
Steve Young

Membership & Marketing

Co-Chairs – Hedda Alexander
& Matt Flood
Charlyn Doyle
Karen Fuller
Seth Hansen
Denise McLean

Research & Development

Sam Farsaii – Chair
Donnie Bruton Jr.
Jarrett Cochran
Adam Feind
David Koonce
Victor Valdez
Steve Wentz

Consultative Services

Dan Armstrong – Chair
Dianne Borreson
Dustin Hardin
Kevin Schwartz
John Sellgren

Strategic Planning Process

In the Fall of 2014, the Texas K-12 CTO Council Board decided to commission The Cambrian Group to lead the organization through a strategic planning process. The Strategic Planning Team first met on October 14-15, 2014 in Dallas, TX, to receive training from The Cambrian Group, led by facilitator, Dr. Bill Cook. Over the two days, the group brainstormed and discussed the following items, which become the basis of the formal plan.

Mission Statement

The mission of the Texas CTO Council, the alliance of technology visionaries, is to ensure the cultivation of technology leaders in education within the state and beyond through unique strategic partnerships, supportive relationships, advocacy initiatives, consultative services, and growth of technology acumen.

Beliefs

We believe that:

- all people want to belong
- learning is essential to human fulfillment
- achievement is multi-dimensional
- each person has something meaningful to contribute
- passion with purpose removes all limits
- everyone has the right to think with no bounds
- action is better than reaction
- challenging the current creates the future
- success occurs when expectation exceeds performance
- there is no single right answer

Parameters

- Our primary focus will be K-12 education.
- We will not be satisfied with less than the transformation of education through technology.
- We will not compromise excellence.
- We will practice the highest ethical and professional standards.

Objectives

- 100% of Texas students are represented by the Texas CTO Council
- 100% of our members achieve the CETL certification
- 100% of our members continuously progress on their self-defined career path
- We are the authoritative source for technology in education.

Strategies

1. We will develop mutually beneficial relationships with natural allies.
2. We will develop and support technology leaders in education through the essential skills of the CETL framework.
3. We will be the preeminent advocates for technology in education.
4. We will aggressively recruit members from all education entities in Texas.
5. We will provide opportunities for research and development through strategic partnerships.
6. We will develop and market a suite of consultative services.

After the Strategic Planning Team completed their work, Action Teams were formed to develop action plans for the overall Strategic Plan. The Action Team Leaders met for training on November 14, 2014 in Houston TX to receive training from The Cambrian Group, led by Lindsey Gunn. These teams worked from November 2014 to January 2015 to develop action plans for their team's strategy. The draft plans were presented to the Strategic Planning Team on Feb. 2, 2015 to review what each team had completed. On April 17, 2015, the Strategic Planning Team met in Houston, TX to accept the plans and develop a timeline for implementing the plans over the next few years. The following action plans comprise the final strategic plan that will serve as a road map for the organization.

Action Plans

STRATEGY 1 – COLLABORATION:

We will develop mutually beneficial relationships with natural allies.

SPECIFIC RESULT 1.1: We will identify our potential natural allies and demonstrate our mutual value.

#	Action Step	Assigned to:	Start Date:	Status:
1.	Develop a database of Natural Ally organizations and their contacts that would have mutually beneficial significance to our membership, such as TASA, TCEA, COSN, ISTE, IMCAT, TASB, TASBO, vendors, etc...	Executive Director, Collaboration Committee	2015-16	completed
2.	Identify current members of Texas CTO Council who are also members of those Natural Ally organizations.	Members	2015-16	Completed
3.	Form a TX CTO committee dedicated to connecting with Natural Allies.	Collaboration Committee	2015-16	Completed
4.	Set up meetings with contacts of other groups so that Executive Director and committee members can discuss mutually beneficial activities with natural ally organizations. (i.e. Host a breakfast for the leaders of the groups to meet).	Collaboration Committee, Executive Director	2015-16	Completed

SPECIFIC RESULT 1.2: We will develop a variety of presentations related to Texas CTO initiatives for various conference audiences.

#	Action Step	Assigned to:	Start Date:	Status:
1.	Identify a team of individuals willing to present on behalf of the Texas CTO Council.	Members	2015-16	Ongoing – through database and survey results
2.	Identify potential opportunities to present at Natural Ally conferences.	Collaboration Committee	2015-16	Ongoing – through database and survey results
3.	Develop CETL presentation for conferences.	Professional Learning Committee	2015-16	completed
4.	Develop presentation regarding the role of the CTO in the organizational structure.	Professional Learning Committee	2015-16	
5.	Identify common advocacy issues and develop presentations for conferences and legislators.	Advocacy Committee	2015-16	Completed for 2017 session
6.	Submit presentation proposals to natural ally organizations conference planning teams.	Collaboration Committee	2015-16	ongoing

SPECIFIC RESULT 1.3: We will clarify and cultivate our relationship with vendors as Natural Allies.

#	Action Step	Assigned to:	Start Date:	Status:
1.	Create database of vendors and customers who can speak on relevant topics.	Staff	2015-16	Completed – through database and survey feedback
2.	Develop a proposal process for vendors wanting to participate or sponsor meetings.	Collaboration Committee	2015-16	Completed – posted on website
3.	Develop and distribute a survey to solicit input from the membership for HOT TOPICS we would like to hear about from vendors. i.e. Roadmaps, emerging technologies, R & D in the industry, etc...	Collaboration Committee	2015-16	Ongoing – through member survey
4.	Invite natural ally organizations to participate in vendor sessions. (i.e. structure like CIO Forums)	Executive Director	2015-16	
5.	Solicit feedback from vendors regarding future workforce needs.	Collaboration Committee	2016-17	

STRATEGY 2 – PROFESSIONAL LEARNING:

We will develop and support technology leaders in education through the essential skills of the CETL framework.

SPECIFIC RESULT 2.1: Provide professional learning **opportunities for all members** that delivers resources that are timely, valuable, and further the skills of the individual as well as benefits the member’s district.

#	Action Step	Assigned to:	Start Date:	Status:
1.	Design a repository of best practices from member districts.	Professional Learning Committee, Staff	2016-17	Website is complete; get members to contribute
2.	Have members post their profiles /accomplishments for viewing by other members to be endorsed.	Members	2016-17	Website is complete; get members to contribute
3.	Create a collection of tool kits including such items as templates, AUPs, bids, metrics to measure, etc...	Professional Learning Committee	2017-18	
4.	Provide opportunities for members to participate in book studies, utilizing online resources associated with study and post their reviews online (i.e. www.johnmaxwellgroup.com ,	Professional Learning Committee	2015-16	ongoing
5.	Host timely webinars that correspond with current challenges or solutions based on member feedback	Professional Learning Committee	2015-16	ongoing
6.	Utilize virtual two-way tools for increased human interaction.	Professional Learning Committee	2015-16	Completed – Zoom, Free Conference Calling
7.	Publish member spotlights showing those who excel in their field.	Staff	2015-16	ongoing
8.	Design feedback system of surveys to gauge new and existing member needs related to professional learning.	Professional Learning Committee	2015-16	Ongoing; new member survey each year in May
9.	Provide orientation to COSN website / resources for new and existing members.	Professional Learning Committee	2015-16	

SPECIFIC RESULT 2.2: Provide professional learning opportunities targeted for those who are **seeking CETL certification** that will support their professional growth and depth of knowledge to prepare for the certification process.

#	Action Step	Assigned to:	Start Date:	Status:
1.	Provide opportunities for members to connect with CETL study groups.	Chair of Professional Learning Committee	2015-16	Ongoing each spring
2.	Provide immersion sessions or kick off sessions to give members a jumpstart on their certification path.	Professional Learning Committee	2017-18	Ongoing each spring
3.	Provide final review sessions led by those who have completed their certification as prospective members near their test date.	CETL Study Group	2015-16	Ongoing each spring

SPECIFIC RESULT 2.3: Provide professional learning opportunities targeted for those **who have achieved their CETL certification** that provides valuable learning experiences and provides continuity within the resources we offer.

#	Action Step	Assigned to:	Start Date:	Status:
1.	Provide CEU credits for participation in approved areas that gives back and adds value to our organization.	Staff	2015-16	Completed – set up Approved Provider status with TEA
2.	Mentor members who are seeking their certification.	Professional Learning Committee	2015-16	
3.	Author best practices documents to be added to our knowledge base.	Professional Learning Committee	2016-17	
4.	CETLs will serve as on site trainer in areas of specialization based on the essential skills framework.	CETLs	2017-18	ongoing
5.	Curate knowledge management articles, where needed, to help maintain consistency and integrity of CETL resources.	Professional Learning Committee	2016-17	
6.	Establish a list of CTOs and CETLs that are available and willing to serve as a mentor to new CTOs.	Professional Learning Committee	2016-17	Ongoing through members surveys
7.	Review the Regions Model for grooming a new superintendent and pattern our model of mentoring after the one the ESC's use.	Professional Learning Committee	2016-17	

STRATEGY 3 - ADVOCACY:
We will be the preeminent advocates for technology in education.

SPECIFIC RESULT 3.1: We will increase and strengthen our relationships with key organizations to promote technology advocacy.

#	Action Step	Assigned to:	Start Date:	Status:
1.	Create Texas K-12 CTO Council contact positions.	Advocacy Committee	Spring 2016	Completed for 2017 Session
2.	Set up email, postal, phone and other contact information.	Advocacy Committee	Spring 2016	
3.	Distribute contact information to legislative and organizational offices.	Advocacy Committee	Spring 2016	
4.	Designated Texas K-12 CTO Council individuals to be responsible for maintaining working relationships.	Advocacy Committee	Summer 2016	
5.	Organize face-to-face meetings with legislators, their staff, working committees, and other organizations.	Advocacy Committee	January 2017	Completed for 2017 Session
6.	Consider an Advocacy Coordinator position or collaboration with a natural ally.	Board	2015-16	Completed – work with TCEA & TASA

SPECIFIC RESULT 3.2: Members will advocate possibilities for instructional technology yet to be considered and share with legislators and other key stakeholders.

#	Action Step	Assigned to:	Start Date:	Status:
1.	Futurists and innovators will be invited to make presentation to the membership.	Meetings & Events Committee	2015-16	
2.	Member “thought” leaders will be invited to present and offer sessions for membership at our annual events.	Meetings & Events Committee	2015-16	Ongoing
3.	Training events will be offered to members to help foster creative thinking.	Professional Learning Committee	2016-17	
4.	Legislators and key stakeholders will be invited to attend trainings and presentations to expand their horizons.	Advocacy Committee	2016-17	Ongoing

SPECIFIC RESULT 3.3: The Texas K-12 CTO Council welcomes all levels of district leadership and provides knowledge to assist them in being more involved in technology advocacy.

#	Action Step	Assigned to:	Start Date:	Date Completed:
1.	Create talking points and position papers tailored to educators	Advocacy Committee	2016-17	Completed for 2017 Session
2.	Provide opportunities to participate in advocacy to include survey, email, phone calls, etc...	Advocacy Committee	2016-17	Completed for 2017 Session
3.	Provide incentives to current members to involve district leaders and superintendents.	Advocacy Committee	2016-17	

STRATEGY 4 – Membership & Marketing:

We will aggressively recruit members from all education entities in Texas.

SPECIFIC RESULT 4.1: A survey of Texas Districts with a 90% return rate

#	Action Step	Assigned to:	Start Date:	Status:
1.	Develop a survey which would include questions: <ul style="list-style-type: none"> • to get a better understanding of COSN • about membership in other technology org /associations • about their avenue for leadership resources and engagement with peers • about how they consume their technology news/information • about benefits they would like to see in an organization like Texas CTO Council 	Membership and Marketing Committee	Summer 2015	Completed – survey emailed each May
2.	Deliver survey by local technology leaders, not by mass email from the state level.	Members	Summer 2016	Completed – groups divided up lists

SPECIFIC RESULT 4.2: Develop a communication plan to increase membership

#	Action Step	Assigned to:	Start Date:	Status:
1.	Review results of statewide survey to develop communication / marketing plan	Membership and Marketing Committee	Fall 2016	Completed; but need to update each year
2.	Update CTO by Region spreadsheet	Membership and Marketing Committee	Fall 2015	Completed but need to update each year
3.	Consider hiring paid marketing person independently or with COSN	TX K-12 CTO Council Board	Summer 2015	Completed – Winter Group does the Clinic marketing
4.	Develop a marketing brochure	Membership and Marketing Committee, Staff	Summer 2015	Completed but needs to be updated
5.	Have marketing SWAG to give away	Membership and Marketing Committee, Staff	Summer 2015	Ongoing
6.	Have a physical presence at trade shows / peer associations	Membership and Marketing Committee, Staff	Fall 2017	Ongoing - TASA
7.	Local technology leaders to spread the word in their area	Members	Summer 2015	Ongoing

8.	Member testimonials on website	Membership and Marketing Committee, Staff	Summer 2015	
9.	Offer incentives to non-members such as: <ul style="list-style-type: none"> • bring a friend / carpool • no cost to listen in on monthly calls • grant/scholarship or comp first year membership 	TX K-12 CTO Council Board	Summer 2015	Completed
10.	Create a retired membership category to include retired members at a reduced rate	TX K-12 CTO Council Board	2015-16	Completed
11.	Have someone take pictures at each event for marketing purposes	Membership and Marketing Committee, Staff	Summer 2015	Ongoing – John Orbaugh, Ernie Stripling

STRATEGY 5 – Research & Development:

We will provide opportunities for research and development through strategic partnerships.

SPECIFIC RESULT 5.1: Develop a standard implementation process for research and development.

#	Action Step	Assigned to:	Start Date:	Status:
1.	Gather interested parties within CTO Council for each topic such as: security, cloud applications, 1:1 devices, disaster recovery, E-rate, etc...	R&D Committee	Summer 2015	Ongoing at CTO Clinic each year
2.	Research collaborative partners with similar interests	R&D Committee	Fall 2015	
3.	Consider costs	R&D Committee	Summer 2015	
4.	Propose to CTO Council Board	R&D Committee	Fall 2015	
5.	Set timeline	R&D Committee	Fall 2015	
6.	Proceed with test / study	R&D Committee	Winter 2015	
7.	Make recommendations	R&D Committee	Spring 2016	
5.	Present / publish findings	R&D Committee, Staff	Summer 2016	

Strategy 6 – Consultative Services:

Develop and market a suite of consultative services to members
as a value-add to membership.

SPECIFIC RESULT 6.1: Develop and market a suite of consultative services for members.

#	Action Step	Assigned to:	Start Date:	Status:
1.	Develop a list of services to be provided such as: technology planning, internal audits, project management, E-rate, bond planning, CTO search, etc...	Consultative Services Committee	2015-16	
2.	Develop strategies to advertise services	Consultative Services Committee	2015-16	
3.	Conduct a survey to identify CTO members skilled and willing to provide each category of consultative services.	Consultative Services Committee	2015-16	Ongoing through members survey each year
4.	Establish a cost model for each category of service (free, paid or referral)	Consultative Services Committee	2015-16	Done for Technology Assessments
5.	Establish an evaluation model for each category of service.	Consultative Services Committee	2016-17	
6.	Determine a method for capturing customer satisfaction feedback to use for improvement of services and marketing.	Consultative Services Committee	2016-17	

Specific Result 6.2: Establish on-line forum to solicit and share technical expertise.

#	Action Step	Assigned to:	Start Date:	Status:
1.	Solidify a common survey tool to use as an organization	Staff	2015-16	Completed
2.	Solidify a common listserv tool to disseminate the information to everyone	Staff	2015-16	Completed through website
3.	Solidify a common blogging tool	Staff	2015-16	
4.	Find a common communication tool (bridge line) or virtual tool for collaboration in real time	Staff	2015-16	Completed – Zoom, Free Conference Calling

SPECIFIC RESULT 6.3: Develop and implement strategies to support vendor partnerships.

#	Action Step	Assigned to:	Start Date:	Status:
1.	Provide opportunities for vendors to participate in round-table discussions with CTO members.	Meeting & Events Committee, Staff	Fall 2015	ongoing
2.	Purchase tables at CTO Clinics and meetings	Vendors	2015-16	ongoing
3.	Sponsor lunches for sales time during the breaks /lunch	Vendors	2015-16	ongoing
4.	Host dinners at CTO events	Vendors	2015-16	ongoing