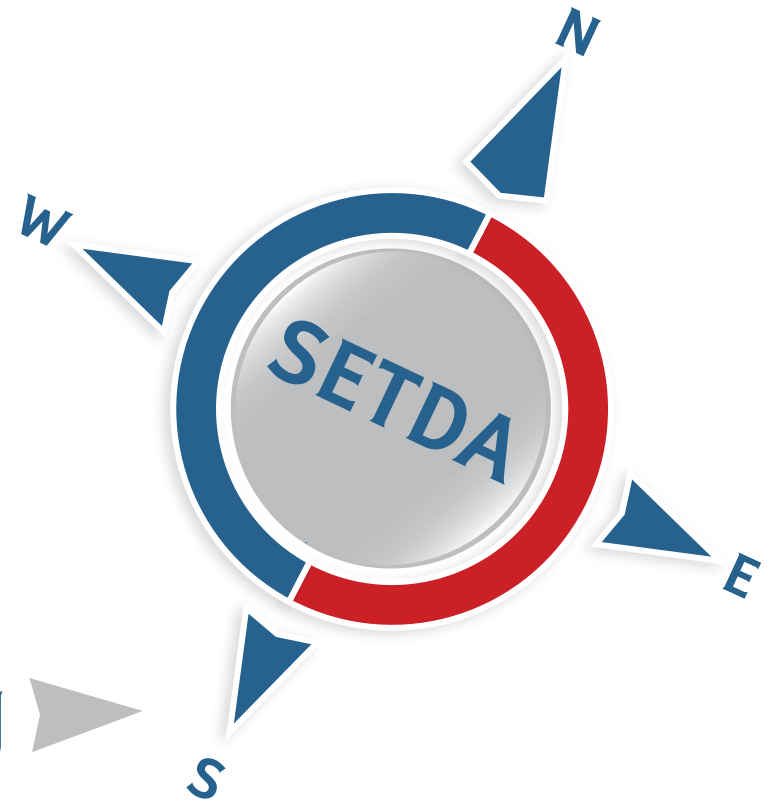Leading ▶

Inspiring ▶

Empowering ▶

SETDA

N W E S

The State Educational Technology Directors Association (SETDA)

2013-2016 Strategic Plan

Approved by the SETDA Board of Directors (October 3, 2012)

SETDA: LEADING, INSPIRING AND EMPOWERING

In 2011, the State Educational Technology Directors Association (SETDA) celebrated its tenth anniversary as the principal non-profit membership association representing U.S. state and territorial educational technology leaders. From the inspiration of state leaders originally looking for a vehicle for collaboration and an organizational home, the association has served a vital role not only for state educational technology directors, but also for policymakers and practitioners interested in supporting effective educational technology policy and practice. While the organization has accomplished much over its first decade, including clearly demonstrating the value of and need for a state-centric educational technology leadership organization, it is evident that neither the organization's members nor the environment in which they work remains unchanged. Indeed, SETDA has seen much change over the last three years in particular, including – but not limited to – the following external and internal/operational changes:

External Changes

- The loss of dedicated federal educational technology funding to the states coupled with a strong likelihood of diminished federal education funding overall for at least the next several years;
- In the absence of a reauthorized ESEA, the rise of new education reform initiatives, funding streams and policies, such as those associated with the Common Core State Standards, Race to the Top, and Race to the Top Assessment;
- Continued evolution in the educational technology marketplace, including industry consolidation, new start-up ventures and products, and the rise of open educational resources (OER) and open source;
- A re-framing of the educational technology field due to budget constraints, new federal priorities and new entrants to the field, including highly influential foundations, investors and advocacy organizations; and,
- Continued evolution in the focus and operations of other associations with an interest in educational technology.

> *"Congratulations to SETDA on a decade's contributions to the digital transformation of the classroom."*
>
> -U.S. Secretary of Education Arne Duncan

Internal and Operational Changes

- Natural turnover in the membership and on the board occurring over time, due to retirements, promotions, and job changes;
- Changes in member roles within their state agencies due to evolving state priorities and reduced state and federal funding;
- Continued growth in SETDA revenue, due in part to success in establishing new funding streams in exchange for work aligned to the shared goals of SETDA and external funders; and
- Turnover and growth in the number of SETDA professional staff serving the membership.

In recognition of these changes, the SETDA Board of Directors committed to developing a new strategic plan in August 2011. Under their leadership, the organization enlisted the expertise of a consultant to develop and help staff to implement a deliberative process for crafting the plan. By hosting a combination of online and in-person events over the course of a year, every SETDA member and sponsor was afforded multiple opportunities to shape the Board's deliberations on the future direction of the organization.

The SETDA strategic plan is intended to be a concise statement of our direction and of the value for state and partner engagement. It reaffirms the commitment by SETDA to being the national leadership organization supporting all states to advance education through technology policy and practice. Via the approach detailed herein, we intend to sharpen the focus of our work, to do so collaboratively with others who share our goals, and – in so doing – to make a marked difference in education.

OUR VISION AND MISSION

Given external and internal/operational changes, it is critical that the SETDA strategic plan embrace the concepts repeated throughout the strategic planning process and give voice to the desire to position SETDA and its members as central to leading the transformation of education by advancing effective educational technology policy and practice. To reaffirm our current and future role in the education sector and our core purpose, the SETDA Board of Directors establishes the following as our organizational vision and mission:

VISION
SETDA leads, inspires, and empowers the education community to leverage technology for learning.

MISSION
The mission of SETDA is to build and increase the capacity of state and national leaders to improve education through technology policy and practice.

In carefully crafting this vision and mission, the SETDA Board of Directors asserts SETDA's unique role in leading the transformation of education through a focus on the dynamic interrelationship of effective federal, state, and local education and technology policies and practices.

OUR VALUES

Our statement of values reflects the commitment of SETDA leadership, staff, members and partners to a shared approach to interacting as a community of professionals.

SETDA is committed to:

- **Serving every U.S. state and territorial education agency**

  Meaningful state engagement makes SETDA stronger and is necessary to fulfill our mission and affect the changes we seek in education.

- **Maintaining a future-focused, holistic view on how to leverage technology for learning**

  As leaders, we must be intentional about the future of education and clear-eyed in our assessment of what needs to evolve if we are to be successful.

- **Fostering collaboration among our members, strategic partners and other education leaders and policymakers**

  A shared understanding of complex issues is necessary to making real and lasting change.

- **Taking action on the important issues facing public education**
  SETDA exists to make a difference; we are oriented to solving important problems and being a recognized, positive force for change.

OUR WORK

The SETDA Board of Directors has established six priorities for the association's focus and work through 2016. These priorities include externally facing goals that speak to our engagement with audiences that influence policies and practices of concern to us, internal goals that speak to core work with our members and strategic partners, and operational goals that speak to the management of the association.

SETDA PRIORITIES: 2013-2016

1) **ADVOCACY:** Advocate for education and technology policies and practices designed to effectively leverage technology for learning.

2) **PROFESSIONAL LEARNING:** Provide relevant, high-quality professional learning opportunities for members.

3) **STATE ACTION:** Inspire and assist states to act collaboratively to advance education through technology policy and practice.

4) **STRATEGIC PARTNERSHIPS:** Establish and engage in strategic partnerships to advance education through technology policy and practice.

5) **COMMUNICATIONS:** Ensure effective communication between and among SETDA, our members, strategic partners, and other key audiences.

6) **OPERATIONS:** Provide effective organizational governance, planning and management to fulfill our mission.

ADVOCACY

Advocacy – the act of influencing policy and practice decisions and resource allocations – has and remains central to the work of SETDA. We focus primarily on federal education and technology policy and budget issues, but also on state issues including especially the interrelationship of policy at the two levels. As an organization that bridges policy and practice, we are mindful that success for our advocacy work is determined ultimately only by its impact on teaching and learning.

SETDA employs the full range of advocacy tools – media outreach, public speaking, conducting and/or commissioning research and writing white papers, use of social media, direct dialogue with policymakers and other leaders – including by empowering members and partners to be good advocates at the federal, state and local levels. SETDA also lobbies within the legal limits established by the IRS for 501(c)3 non-profit organizations.

ADVOCACY GOAL:

Advocate for education and technology policies and practices designed to effectively leverage technology for learning.

PRIORITY ACTIVITIES:

- Develop and advance a national advocacy agenda on behalf of our members.

  The agenda – developed with member input and periodically updated to reflect changing circumstances – will provide a framework for clarifying the policies with which SETDA is concerned and our high-level positions. It will serve as the foundation for advocacy activities conducted and coordinated by staff.

- Empower members and strategic partners to advance SETDA's advocacy agenda.

  Grassroots advocacy is critical to being effective. As such, SETDA will train, support and facilitate the advocacy of our members and strategic partners.

- Track, curate, and communicate information on relevant, evolving educational technology-related issues.

  Given that educational technology is a constantly evolving field, it is critical that SETDA conduct the research necessary to remain a trusted and honest broker of information on topics and issues of importance to the membership.

- Provide subject matter expertise to other associations and organizations, policymakers, and the media.

  SETDA will proactively communicate to and dialogue with a broad cross-section of stakeholders who influence policy and practice issues of importance to the membership.

PROFESSIONAL LEARNING

Core to the mission of highly effective professional membership associations like SETDA is facilitating the development and advancement of the job-related skills and knowledge of members. SETDA remains committed to strengthening our membership through professional learning offerings, including via formal and informal mechanisms, face-to-face and online.

We recognize that our members vary with respect to their specific job duties; the length of time in their jobs; their backgrounds in education, technology, and public policy; and their interest and availability to engage with us on any given day. We also understand that SETDA members take advantage of a wide range of resources to further their professional learning, including from trade publications and other membership associations. As such, SETDA aims to provide a range of unique opportunities that members view as being of high quality and relevant to their needs over time.

PROFESSIONAL LEARNING GOAL:
Provide relevant, high-quality professional learning opportunities for members.

PRIORITY ACTIVITIES:

- Offer a variety of face-to-face, blended, and online professional learning opportunities for members.

  SETDA will continue to offer a range of professional learning opportunities on relevant topics to members. We are committed to refining our offerings over time to maximize member engagement and satisfaction.

- Launch a vibrant online professional community of practice for members and strategic partners.

  Building from lessons learned with member use of existing tools, SETDA will launch an enhanced online community of practice to facilitate learning and networking in between formal professional learning activities.

- Foster informal networking and relationship building among members, other state colleagues, strategic partners, and others.

  Sometimes the most powerful learning arises from informal sharing and relationship building. Such relationship building also serves to increase the level of trust necessary for real and lasting collaboration. Through this activity, SETDA remains committed to being intentional in the fostering of informal relationships through structured and unstructured learning opportunities.

STATE ACTION

While each state in which SETDA members work has a unique context, all states face similar policy and practice issues related to the use of technology in education. SETDA members have a long and remarkable history of sharing best practices and collaborating across state lines to address both internal state issues *and* national needs.

As we move forward under a new strategic plan, the SETDA Board of Directors envisions an even stronger role for the association in helping members to address common, national education and technology issues facing the states. This national leadership role involves establishing a shared vision for how the field is evolving and where gaps exist that SETDA is or can be best positioned to address.

STATE ACTION GOAL:

Inspire and assist states to act collaboratively to advance education through technology policy and practice.

PRIORITY ACTIVITIES:

- Develop and implement an iterative process to align SETDA initiatives and projects with member priorities for collaboration.

  By focusing on a core set of issues and initiatives, SETDA will increase its effectiveness over time. In developing our state action agenda, we will need to strike a balance between matching national needs with the individual interests of states and also in keeping sufficiently nimble to address new developments as they arise.

- Assist states to improve learning by addressing relevant issues. These currently include but are not limited to: instructional quality and educator effectiveness, technology readiness for online assessment, the use of digital and open (OER) content, robust broadband and device access, and interoperability.

  While this is an illustrative list of issues, many of these activities have launched and/or expanded in recent years due to investments in SETDA by the federal government and from similarly focused foundations. If an issue is important to the membership, SETDA staff should be empowered to seek resources and partnerships to address it.

STRATEGIC PARTNERSHIPS

It is neither desirable nor possible for SETDA to fulfill its mission by acting in isolation. Whether it is by working closely with technology companies or investors to shape the products and services coming to the K-12 market or with other associations and non-profits who share mutual goals for school improvement, SETDA members and staff have been instrumental in brokering meaningful partnerships with a range of companies, organizations, and foundations.

Successful partnerships are enabled by shared aims, clear roles and responsibilities for each partner, ethical behavior, and a commitment to action. SETDA holds high standards for itself and expects the same from all of our partners.

STRATEGIC PARTNERSHIPS GOAL:

Establish and engage in strategic partnerships to advance education through technology policy and practice.

PRIORITY ACTIVITIES:

- Encourage educational technology product development and grow the pipeline for creating solutions to educational needs through relationships with established and emerging companies.

  By taking responsibility for engaging with established and emerging education and technology companies and investors, state educational technology leaders play a valuable role in ensuring that future educational technology products and services are of high-quality and align with state education goals and needs.

- Secure strategic partnerships with organizations that align with SETDA's core initiatives and advocacy agenda.

  SETDA is committed to working in coalition with other organizations that share our advocacy and state action goals and are instrumental to helping us to accomplish them.

- Develop and communicate a code of conduct on member-strategic partner engagement.

  Public-private partnerships are vital to advancing education. Under this activity, SETDA will codify and institutionalize our expectations for behavior in those partnerships.

COMMUNICATIONS

Changes internal to SETDA and its membership, a dynamic policy context, and new entrants to the field of educational technology – taken together – necessitate taking an activity inherent in each of our other goals and elevating its importance in our governance, planning, and accountability mechanisms.

Given the primacy of our advocacy goals and intent to inspire state action, coupled with a commitment to engaging meaningfully with every state and territory, it is imperative that SETDA have a strategy for communications and marketing that is up to the task of our ambitions – and the capacity to execute it.

COMMUNICATIONS GOAL:

Ensure effective communication between and among SETDA, our members, strategic partners, and other key audiences.

PRIORITY ACTIVITIES:

- Review and refresh the SETDA brand.

  Great brands inspire passion and belonging - and create urgency. With a new strategic plan, changes in the field, and after 10 years of success, it is time for SETDA to embark on a refresh of its brand.

- Establish and implement marketing and communications plans to effectively communicate our work and views.

  If we are to advance our advocacy and state action goals and remain meaningfully engaged with state and national leaders over time, SETDA requires a carefully crafted marketing and communications strategy, including media outreach.

- Cultivate an online, mobile, and social media presence that fosters dialogue among members, strategic partners and other key audiences.

  The SETDA website and social media (and mobile) presence should reflect our advocacy and state action goals, support member professional learning, and be a hub for inter-state dialogue and public-private partnerships.

OPERATIONS

An operations goal is an entirely internal goal, but activities to be carried out as part of this goal will ensure that the current generation of SETDA leadership and staff have the tools and processes in place to effectively steward the organization into our second decade and beyond.

SETDA must have the internal governance, planning and management capacity to carry out our mission and fulfill our advocacy and state action goals. Indeed, the process undertaken to develop the strategic plan itself underscores the value of a focus on operations.

OPERATIONS GOAL:

Provide effective organizational governance, planning and management to fulfill our mission.

PRIORITY ACTIVITIES:

- Ensure governance policies and practices are appropriate and sufficient.

    The SETDA bylaws, board polices and board practices should be periodically reviewed and updated to ensure they reflect the needs of the organization and best practices in non-profit management.

- Maintain the efficient operations and management of the organization.

    The SETDA staff – working in partnership with the SETDA Board of Directors – intends to continue to ensure the efficient operations of the association and maximize the return on investment in SETDA by the states and our strategic partners.

- Secure sufficient and diversified financial support to meet organizational goals.

    SETDA goals and activities must be sufficiently resourced if we are to deliver on the promises we make to our membership. In so doing, SETDA revenues must be appropriately diversified to ensure SETDA is not overly dependent on any one funder or type of funding. Moreover, a diversified funding model will ensure that SETDA is better able to maintain core activities and services during less favorable economic and policy cycles.

THE NEXT THREE YEARS AND BEYOND

While this strategic plan document was a year in the making, involving multiple opportunities for input and engagement from SETDA staff, members and strategic partners, the creation of the plan itself is not the end goal. Rather, the SETDA Board of Directors and staff will use this document as a compass to reorient our work and activities, our fundraising and spending plans, and our governance.

We will continue to seek out input and comment on how best to realize our mission and accomplish our goals and will put into place accountability metrics so as to report on our progress to the membership annually. And, at the conclusion of the next three years, we commit to evaluating this plan and our progress, to systematically reviewing internal and external changes to the association, and to engaging the membership and our partners in an inclusive process to revise and update the plan.

In releasing this plan, SETDA is declaring to the states, to our strategic partners, to policymakers and to the wider education field that it is our intent to lead, inspire, and empower the education community to leverage technology for learning.

We invite you to join us on our journey as we chart a better future for education, faster.

OPERATIONS GOAL:

Provide effective organizational governance, planning and management to fulfill our mission.

PRIORITY ACTIVITIES (CONTINUED):

- Ensure continuity and transparency of organizational roles, responsibilities, and decision-making.

  The SETDA Board of Directors is committed to strengthening the governance practices of the organization, including an explicit focus on ensuring the continuity and transparency of key organizational decisions.

- Foster the professional growth of SETDA staff and current and future SETDA leaders.

  SETDA is only as strong as our people. In recognition of this fact, the SETDA Board of Directors is committed to ensuring the continued professional growth of SETDA staff and to the intentional development of current and future SETDA leaders.

ACKNOWLEDGEMENTS

The 2013-16 SETDA Strategic Plan is a product of the SETDA Board of Directors, committee leadership and staff. In developing and implementing a year-long inclusive process to solicit SETDA member and partner input, SETDA was assisted by Laura Gramling of CoVision, Inc.

Board of Directors

Jeff Mao, Chair, Maine Department of Education

Melinda Stanley, Vice Chair, Kansas State Office of Education

Cathy Poplin, Treasurer, Arizona Department of Education

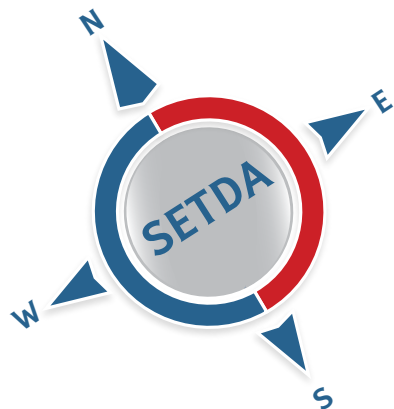**Rick Gaisford,** Secretary, Utah State Office of Education

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In addition, the SETDA Board of Directors would like to thank Verda McCoy, eTech Ohio, for her participation in our August 2012 strategic retreat.