



**Illinois Principals Association**

**Illinois Principals  
Association  
2940 Baker Drive  
Springfield, IL 62703  
(217) 525-1383  
[www.ilprincipals.org](http://www.ilprincipals.org)**

# **IPA Action Plans 2007-2010**

*(Adopted January 17, 2008)*

# Fiscal Resources & Facilities

## **ACTION PLAN (FRF 1)**

**Strategy:** Grow the financial capacity of the IPA to meet future needs.

**Title:** Departmentalize Budget

**Specific Objective:** Departmentalize budget to better track revenues and expenses.

- 1) Initiate use of the IPA Auditor.
- 2) Speak with other Associations about their budget methodology.
- 3) Analyze the Pros & Cons of budget departmentalization.
- 4) Explore the impact on staff.
- 5) Explore the impact on membership.
- 6) Review cost implications (i.e. Software, training, auditor).
- 7) Make decision of whether to departmentalize budget.
- 8) If yes, develop implementation timeline.

*Key Accomplishment(s):*

*The IPA restructured the budget beginning FY 2009.*

## **ACTION PLAN (FRF 2)**

**Strategy:** Grow the financial capacity of the IPA to meet future needs.

**Title:** Accounting Mechanism

**Specific Objective:** Examine the cost/benefit of cash vs. accrual base accounting.

- 1) Initiate use of the IPA Auditor.
- 2) Speak with other Associations about their budget methodology.
- 3) Analyze the Pros & Cons.
- 4) Explore the impact on staff.
- 5) Explore the impact on membership.
- 6) Review cost implications (i.e. Software, training, auditor).
- 7) Make decision of whether to stay with cash or go with accrual.
- 8) If switching to accrual, develop implementation timeline.

*Key Accomplishment(s):*

*Due to cost and time constraints, the operating account revenues and expenditures are accrued on a monthly basis only. The information is provided to the Board of Directors at its quarterly Board meeting to give a clear picture of the Association's fiscal position.*

## **ACTION PLAN (FRF 3)**

**Strategy:** Grow the financial capacity of the IPA to meet future needs.

**Title:** Revenue Growth

**Specific Objective:** Examine and pursue opportunities to grow IPA revenue.

- 1) Develop short- and long-term investment strategy.
  - a. Develop investment goals.
  - b. Contact various banks and/or local investment firms.
  - c. Have presentations done by banks and/or firms.

- d. Develop strategy and implement.

*Key Accomplishment(s):*

*The IPA developed and approved an Investment Policy in January 2008. The policy stipulates a very conservative investment approach currently allowing for investments in bonds and cash equivalents until the economy improves and equities become safer. The investment policy and approach has allowed IPA to significantly improve the rate of return on its investments.*

- 2) Pursue business partnerships.
  - a. Review current partnerships to ensure they are fully maximized.
  - b. Pursue new opportunities.

*Key Accomplishment(s): The IPA has developed business agreements with ECRA (Leadership 360), SchoolTube and Accellify (Medicaid reimbursements). The Association's new Model Student Handbook Service stands to generate additional revenue for Association operations. The IPA is also exploring additional opportunities including e-commerce, providing online Administrator Academies to other states and developing an on-demand webinar subscription service.*

- 3) Increase IPA sponsorships/exhibitors.
  - a. Set goals and targets.
  - b. Develop comprehensive sponsorship package/opportunities. (i.e. conference, board meetings, website, PrinciPal, etc.)
  - c. Develop plan to ensure conference exhibit hall is full each year.
  - d. Pursue appropriate companies.

*Key Accomplishment(s): The IPA has developed a "Partner Program" to clearly outline sponsorship opportunities. BoothBoss was utilized to allow exhibitors to register for the Fall Conference online. BoothBoss provided a value added service by registering exhibitors for 2010 onsite at the 2009 conference. Incentives and pricing continue to be explored for both potential sponsors and exhibitors during the downturn in the economy.*

- 4) Develop plan for appropriate and natural dues increases.

*Key Accomplishment(s): The IPA Board of Directors approved and Congress concurred the adjustment of dues by increasing the dues ceiling and floor ten dollars each year for the next three years. This will greatly assist with budgeting and planning.*

- 5) Develop plan and processes to improve efficiency and spending.

*Key Accomplishment(s): The IPA restructured its distribution of Field Staff which reduced spending on travel. Significant adjustments have been made in how professional development is advertised which has resulted in the savings of over \$100,000 each year.*

- 6) Place revenue growth items into overall IPA system (Playbook).

*Key Accomplishment(s): Done with adjustments being made continually.*

## **ACTION PLAN (FRF 4)**

**Strategy:** Provide the facility and resources necessary to meet the needs of the organization.

**Title:** Staffing Needs

**Specific Objective:** Conduct a staff analysis to ensure appropriate staff for operating efficiency and maximum member service.

- 1) Review previous IPA staff needs assessment.
- 2) Review current workload and staff job descriptions.
- 3) Review approved IPA Action Plans.
- 4) Conduct additional formal needs assessment if necessary.
- 5) Develop staffing plan.

*Key Accomplishment(s): Since 2007, the following positions have been added to accommodate contract and grant work and additional services provided by the Association: Mentoring Director, Mentoring Coordinator (currently unfilled), Technology Coordinator, Executive Assistant, and Bookkeeping Assistant. Job descriptions were rewritten and job titles redefined to more accurately reflect actual job responsibilities.*

## **ACTION PLAN (FRF 5)**

**Strategy:** Provide the resources and facilities necessary to meet the needs of the organization.

**Title:** Facility

**Specific Objective:** Analyze facility usage and needs of the IPA Office.

- 1) Create facilities subcommittee.
- 2) Assess current and future staffing needs.
- 3) Assess current and future technology needs.
- 4) Review approved IPA Action Plans.
- 5) Develop plans for building/additions.
- 6) Develop payment strategy.

*Key Accomplishment(s): The patio was enclosed on the IPA Office to accommodate the bookkeeping department. The project was paid for in cash. The IPA Office is currently full, and a three year facilities plan will be developed by the end of FY 2010 to provide recommendations for current building expansion.*

*Other Key Accomplishment(s): The IPA is debt free and has added approximately 50% to its cash reserve over the last three years.*

# Membership

## **ACTION PLAN (MEM 1)**

**Strategy:** Build a diverse membership of current and aspiring educational leaders

**Title:** Increase A Diverse Membership

**Specific Objective:** Increase growth and retention with diverse membership

- 1) Investigate hiring marketing firm to increase membership and branding
  - a. Target LUDA – data needed to make decisions about which districts and which administrators to target.

*Key Accomplishment(s): The IPA Board of Directors approved a dues incentive plan for districts with 15 or more educational leaders. The incentive has provided the necessary encouragement for certain large districts to sign-up and pay for all their building level leaders to be IPA Members.*

- b. Target minority members for strategies and assistance with recruitment practices.

*Key Accomplishment(s): See below.*

- c. Enhance branding and immediate name recognition.

*Key Accomplishment(s): The IPA staff has adopted a Ritz Carlton service model to ensure IPA Members are treated with the best, most timely service possible. The IPA has worked to improve its physical image by improving the look and content of the IPA Newsletter, PrinciPal Connection, professional development promo material and exhibit booth. The IPA has begun recognizing member accomplishments in the PrinciPal, spotlighting members in the Newsletter and sending press clippings and notes from the Executive Director. Leaders new to their positions are also being provided a congratulatory letter along with a copy of the IPA Transition Worksheet. The IPA continues to seek opportunities to be physically present including the Triple I Conference, Mount Vernon Conference and IASA Conference. Membership agreements were developed with IASCD and IRTA.*

- d. Survey current members to determine needed services and benefits.

*Key Accomplishment(s): Members are surveyed on an annual basis.*

- 2) Develop strategies for increasing membership diversity in underrepresented groups (minority, gender, building levels, etc.)
  - a. Create focus groups of “underrepresented” groups for gaining additional insights.
  - b. Investigate adding “minority chair” or other options at the state and regional board levels.

*Key Accomplishment(s): The IPA held a diversity focus group on April 22, 2009. Several recommendations were developed for the IPA to consider in future planning and improvement efforts.*

- *Encourage current IPA leaders to invite and “mentor” minority leaders*
- *Educate Members of leadership roles and opportunities within the IPA and why they are important*
- *Find out what other associations are doing in the face of similar challenges*
- *Encourage “cultural” education and awareness*
- *Enhance the profession. Do more to encourage quality people to enter the profession.*
- *Continue providing opportunities for this group to meet, maybe in conjunction with Membership Committee.*

## **ACTION PLAN (MEM 2)**

**Strategy:** Strengthen regions, member services and membership development

**Title:** Increase Involvement

**Specific Objective:** Increase Region and Member Involvement

- 1) Examine effectiveness of current region structure on membership involvement.
  - a. Convene a focus group to study the current model to see if it is meeting member needs.
  - b. Examine the existing field position model for effectiveness.

*Key Accomplishment(s): A focus group is scheduled to meet in the spring to discuss the current IPA Region Structure. The Field Staff structure was reconfigured to have one Field Director that coordinates work statewide with five Field Coordinators assigned strategically around the state to provide more personal service and control costs.*

- 2) Examine effectiveness of IPA systems of communications
  - a. Survey current members regarding usefulness of current means of communications.
  - b. Explore other communication means or strategies using other state association models.

*Key Accomplishment(s): The most recent Member Needs Assessment survey showed that 93.1% of those that responded either Strongly Agree or Somewhat Agree that IPA communicates effectively with the membership. When comparing the IPA to other associations nationwide, the IPA is a leader in its usage of various communication tools to connect with Members including the Newsletter, Bulletin, PrinciPal, Facebook, Twitter, Ning, SchoolTube, Podcasting and the website.*

## **Professional Development**

### **ACTION PLAN (PD 1)**

**Strategy:** Enhance professional development to meet the evolving needs of educators.

**Title:** Alternative Professional Development Systems

**Specific Objective:** Implement alternative professional development systems.

- 1) Investigate a variety of delivery systems.
- 2) Develop new programmatic concepts utilizing technology delivery systems.
  - a. Develop procedures and logistics.
  - b. Develop online professional learning communities.

*Key Accomplishment(s): The IPA continues to lead the profession nationwide with its professional development offerings. Great strides have been made to provide the most up-to-date and relevant professional development educational leaders need. Speaking specifically about on-line learning, the IPA continues to expand the variety and improve the quality of its online Administrator Academies. As travel budgets continue to tighten, IPA's online offerings are becoming more popular. As a value added service to Members, the IPA has begun providing webinar recordings on the website so individuals may access them on-demand. The IPA has also been exploring how social media sites can be used to enhance professional development and networking. For example, IPA's Ning site is being used for a book study.*

## **ACTION PLAN (PD 2)**

**Strategy: Enhance professional development to meet the evolving needs of educators.**

**Title: Continued Commitment to Professional Development**

**Specific Objective: Ensure a high level of commitment to quality professional development by providing resources to support the growth and improvement of professional development programs.**

- 1) Continue to analyze the needs of the program.
  - a. Complete a needs assessment.

*Key Accomplishment(s): A Member Needs Assessment is completed on an annual basis.*

- 2) Continue to cultivate and expand partnerships with educational and non-traditional entities.
  - a. IPA/Alliance
  - b. IPA/ROEs

*Key Accomplishment(s): The IPA has partnered with the ROEs to provide IIRC training to educational leaders. This was done mixing online learning with face-to-face interaction on a regional basis. The IPA partnered with the Alliance to provide a one-day conference for school, district and government secretaries.*

## **ACTION PLAN (PD 3)**

**Strategy: Enhance professional development to meet the evolving needs of educators.**

**Title: Accessibility to Professional Development**

**Specific Objective: Annually assess the geographic and demographic distribution of workshops.**

- 1) Evaluate feedback from participants.
- 2) Analyze cost benefits.
- 3) Analyze the demographics of participants.
- 4) Analyze methods for providing professional development for underserved populations of principals.

*Key Accomplishment(s): Workshop development and distribution is continually analyzed based on participation rates, the member needs assessment and cost effectiveness.*

# Legislative

## **ACTION PLAN (LEG 1)**

**Strategy: Improve legislative influence and advocacy.**

**Title: Region Legislative Activity**

**Specific Objective: Increase Region discussion/accountability related to legislative activities.**

- 1) IPA Regions shall develop goals relative to legislative advocacy.
- 2) Increase IPA membership attendance at legislative events (Elected officials golf outings, receptions, dinners, etc.)
- 3) There shall be an update and status report on the legislative goals of that Region at Region meetings.
- 4) Provide Capwiz demonstration/trainings at Region Meetings/Events
- 5) Provide Capwiz reminders in IPA Newsletter & PrinciPal

*Key Accomplishment(s): IPA staff continues to work with Regions to encourage interaction with local elected officials. Capwiz usage is continually encouraged via Association communication mechanisms. Capwiz demonstrations were provided at the 2009 Fall Conference. IPA developed a new platform statement and made it available on the website. IPA recently shepherded legislation allowing for a second year of mentoring.*

## **ACTION PLAN (LEG 2)**

**Strategy: Improve legislative influence and advocacy.**

**Title: Lobby Day**

**Specific Objective: Promote Lobby Day and encourage participation from members.**

- 1) IPA Lobby Day Agenda shall be shared ahead of time through the IPA website and Government Relations Director.
- 2) Establishing a date for Lobby Day in sufficient time to disseminate information among IPA membership.
- 3) Each Region shall encourage representation from members throughout the entire Region (due to the fact that there are multiple legislative districts in each of the IPA 21 Regions). Have a minimum of 4 State legislators from each region.
- 4) Members shall report issues of non-support from Superintendents in their district in regards to a Principal leaving the school building to attend Lobby Day (Assistance will be provided by the Government Relations Director).

*Key Accomplishment(s): After significant effort to promote and incentivize attendance, the IPA has decided to suspend this activity to focus on legislative involvement at the local and region level. The IPA will continue to explore Lobby Day as a viable option as a part of the Association's advocacy effort.*

## **ACTION PLAN (LEG 3)**

**Strategy: Improve legislative influence and advocacy.**

**Title: Develop Relationships with State Elected Officials**

**Specific Objective: Develop quality relationships between IPA Members and State Elected Officials.**

- 1) Members shall contact their State Representative and State Senator to set up a meeting at least 1 time each school semester. This can be a joint meeting with other IPA members in their IPA Region.
- 2) Members shall invite elected officials to visit their school at least twice throughout the school year, with “IPA Principal for a Day” program counting as one of those visits.
- 3) IPA Regions shall invite elected officials to attend Region social events and Region meetings.

*Key Accomplishment(s): IPA staff continues to work with Regions and Members to encourage interaction with local elected officials.*

## **Policy**

## **ACTION PLAN (POL 1)**

**Strategy: Develop a comprehensive policy manual for the IPA by 2010.**

**Title: IPA Policy**

**Specific Objective: Develop a comprehensive policy manual for the IPA by 2010.**

- 1) Make a comprehensive list of policies that will become part of the policy manual.
- 2) Quarterly, pick policies to develop for the next board meeting.
- 3) Complete manual by 2010.
- 4) Once complete, continue to update and revise.

*Key Accomplishment(s): The IPA Policy manual has been developed. An update and revision schedule is currently being considered.*