CASE Institute Host Planning Guide
# Table of Contents

CASE Mission.......................................................................................................................... 4
Partners for Success .................................................................................................................. 4
Minimum CASE Institute Requirements .................................................................................. 5
CASE Institute Host Site Selection and Certification .............................................................. 5
CASE Role and Responsibilities ................................................................................................. 6
  CASE Staff ............................................................................................................................... 6
  Lead Teachers and Master Teachers ....................................................................................... 6
  New CASE Institute Host Sites ............................................................................................... 7
CASE Institute Host Role and Responsibilities .......................................................................... 7
  Affiliate Post-Secondary Institution ....................................................................................... 7
  Website Recommendations ..................................................................................................... 8
  Classroom and Laboratory Facilities ...................................................................................... 8
  Equipment and Supplies ......................................................................................................... 9
  Policing Role of Host Site Coordinator ................................................................................ 10
  Mentoring and Monitoring of Lead Teachers ...................................................................... 10
Accounting – Registration Fee Collection and Expense Payment .......................................... 11
Affiliate Professor Designation .................................................................................................. 11
Alternative Schedule Formats for CASE Institutes ................................................................. 11
  Course Institute Length ......................................................................................................... 12
  Orientation Session Specifications ......................................................................................... 13
Budgeting Guidelines for CASE Institutes ............................................................................... 13
  CASE Certification Fee .......................................................................................................... 14
  CASE Lead Teacher Service Fee ........................................................................................... 15
Equipment and Supplies ........................................................................................................... 15
  Equipment Disclosure ............................................................................................................ 15
    LabQuest® and Bio-Rad® Equipment Requirement ............................................................ 15
  Consumables .......................................................................................................................... 15
  Textbooks and Software ....................................................................................................... 16
  Participant Shirts ................................................................................................................... 16
  Printing .................................................................................................................................. 16
  Lodging for Participants and Lead Teachers ....................................................................... 16
  Dormitories .............................................................................................................................. 17
CASE Mission

CASE is committed to the goal of improving educational experiences for agriculture students by empowering agriculture teachers. The specific mission of CASE is to:

1. Provide a system of curriculum and professional development for teacher change promoting rigorous and relevant student learning opportunities
2. Leverage partnerships with public and private entities to provide resources to teachers and students to facilitate change
3. Position Agricultural Education to be a solution to academic challenges in secondary education

Partners for Success

CASE encourages state leadership to use a Team AgEd approach for the implementation of the CASE model in your state or region. CASE promotes a cultural change in teaching practice and such a change requires not only resources and training but also an ongoing support network for teachers. CASE provides ongoing support with Communities of Practice and other methods, but localized professional learning communities tend to be the most effective strategy for supporting teachers.

The Team AgEd approach involves all local agricultural education entities including, but not limited to Department of Education, Department of Agriculture, FFA Staff, NAAE Affiliate, University Teacher Educator Department(s), Regional and Community College Partners, FFA Alumni, Young Farmer and Rancher Programs, Agriculture in the Classroom, Farm Bureau, Commodity Associations and/or other Business and Industry Partners, and FFA Foundations. If these entities work together to secure resources and develop networking for classroom teachers, statewide or regional goals can produce an environment for efficient and effective implementation of CASE.

CASE recognizes three representatives from each state to serve as CASE State Leaders. Each state representative includes state Department of Education or Department of Agriculture staff, post-secondary education faculty member, and secondary agricultural science teacher. A list of State Leaders is on the CASE website. The CASE State Leader and CASE Staff are also important extensions of the Team AgEd community and CASE representation is encouraged in long-range planning and other Team AgEd activities.
Minimum CASE Institute Requirements

CASE is a system of developing instructional skills and providing educators with excellent resources to facilitate powerful teaching. The key to CASE effectiveness is intense professional development specifically related to CASE-designed materials for classroom instruction. Each CASE course requires a specific CASE Institute as course content for each course is thoroughly examined and practiced.

CASE requires that every CASE Institute Host provide a rigorous and meaningful experience for participants. Uniformity across sites is extremely important for validity of data from program evaluations and student assessments. CASE expects every participant to have an equally challenging experience to promote enhanced classroom opportunities for agricultural education students. To ensure quality and uniformity of professional development, CASE has set minimum requirements that must be met.

Minimum requirements for certification of CASE Institute participants include the following:

- **CASE Institutes must provide the required hours of instructional time prescribed by the scope and sequence for the specific course. Host Site Coordinators can pick from schedule formats as listed in subsequent sections of this guide.**
- **ALL participants MUST be present for the entire CASE Institute – NO EXCEPTIONS.** This is an important rule Host Site Coordinators must communicate. CASE has made special considerations for attendees in the past such as remedial sessions for those who miss a few hours of instruction. This kind of remedial plan adds to the already heavy work load of Lead Teachers and creates more management for you as a Host Site Coordinator. Exceptions are discouraged as once the door is opened others may try and take advantage for unnecessary absences. CASE will not grant certification to any participant that does not complete all professional development hours of instruction.
- **Instruction for CASE Institutes will be facilitated by two CASE certified Lead Teachers.** Certified instructors are important to ensure quality of instruction. Two Lead Teachers are required due to the intense nature of this event. The rigors of the face-to-face professional development and the intense preparation required warrant a minimum of two qualified instructors.
- **Professional development will emulate classroom expectations of participants.** The facilities and instruction will model how CASE encourages participants to teach in their classrooms. It is vital for the CASE Institute Host to provide the equipment, facilities, and supplies recommended so participants receive the richest experience possible.

Host Site Coordinators, Lead Teachers, and CASE staff ensure the integrity of CASE Institutes. Full cooperation and unified support for CASE Institute protocols is important to ensure top-quality experiences for participants across the country.

CASE Institute Host Site Selection and Certification

CASE Institute Host applications are available online at [www.case4learning.org](http://www.case4learning.org) by clicking ‘Professional Development’ then ‘Affiliate Institutions’. A submitted application does not guarantee CASE will select a potential site to host an institute. CASE staff factor in geographic locations, previous site evaluations, and other elements before awarding an institute to a site. Limitations are imposed to ensure the pool of qualified Lead Teachers is large enough to handle CASE Institute offerings, and to maintain integrity and quality of CASE Institutes.

CASE Institute Hosts will be rated based on the following considerations:

- ★ Affiliate Professor on Staff
- ★ Required Equipment in Inventory
- ★ Strong Evaluations
- ★ Offers Graduate Credit
- ★ Preparation and Host Logistics
- ★ Promotion and Recruitment of Teachers
This six-star rating system allows a CASE Institute Host to determine areas for improvement. The rating system will also determine priority status for course offering and desired dates for sessions. The more stars a CASE Institute Host has, the better their chance of getting desired dates for session(s). Lower star-rated CASE Institute Hosts may not be granted an institute depending on the number of course sessions requested by CASE Institute Hosts with higher ratings.

**CASE Role and Responsibilities**

The primary role of CASE staff is to provide CASE Institute Hosts management support for hosting CASE Institutes. These guidelines exist to ensure consistency across institutes. Consistency is vital for validity concerns regarding CASE assessment data. CASE staff will also provide on-going teacher services to help with daily implementation of materials. Without consistency of institute experiences, the ability to manage support systems after the institute will be impaired.

CASE also has a responsibility to provide assurances to school administrators and state supervisors that CASE certified teachers have met the professional development criteria. The certification process provides training for participants in utilizing CASE materials effectively and promoting higher quality learning experiences for students. Schools and states make a large investment in teachers who become CASE certified. CASE staff and CASE Institute Hosts have a responsibility to these stakeholders to ensure quality experiences are provided.

**CASE Staff**

CASE staff each have a different role in working with CASE Institute Hosts and CASE Institutes. The main contact for all CASE Institute Hosts is the CASE Digital Learning/Certification Coordinator, Sara Cobb. This staff member handles all institute scheduling, implementation, reporting, Lead Teacher scheduling, training, communication, and any issues that arise during institutes. The next contact is the Operations/Outreach Director, Miranda Chaplin. The Operations/Outreach Director handles orders for CASE Institute materials offered through the CASE store, billing for institutes, and all paperwork regarding certification for participants. Use the following information to help determine who to contact for other questions.

<table>
<thead>
<tr>
<th>Table 1. CASE Staff Contact Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Title and Name</strong></td>
</tr>
<tr>
<td>Project Director Nancy Trivette <a href="mailto:Nancy.trivette@case4learning.org">Nancy.trivette@case4learning.org</a></td>
</tr>
<tr>
<td>Operations/Outreach Director Miranda Chaplin <a href="mailto:miranda.chaplin@case4learning.org">miranda.chaplin@case4learning.org</a></td>
</tr>
<tr>
<td>Pathway Coordinator Carl Aakre <a href="mailto:carl.aakre@case4learning.org">carl.aakre@case4learning.org</a></td>
</tr>
<tr>
<td>Pathway Coordinator Melanie Bloom <a href="mailto:melanie.bloom@case4learning.org">melanie.bloom@case4learning.org</a></td>
</tr>
<tr>
<td>Certification/Digital Learning Coordinator Sara Cobb <a href="mailto:sara.cobb@case4learning.org">sara.cobb@case4learning.org</a></td>
</tr>
</tbody>
</table>

**Lead Teachers and Master Teachers**

CASE prepares classroom teachers to provide instruction for CASE Institutes. This model is an excellent approach because peer teaching provides an opportunity for Lead Teachers and participants to share common experiences in overcoming barriers for implementation of CASE curriculum. CASE Lead Teachers will mentor participants during the CASE Institute and maintain discussion forums throughout the year to provide on-going support as participants begin using CASE in their classrooms.
An operational definition of “Lead Teacher” is a teacher that is CASE certified in the specific course they intend to facilitate, has taught the course in their program according to design for a full year, and completed Lead Teacher Orientation. CASE Master Teachers are teacher trainers who are certified in the specific course, have provided instruction to secondary students in that course for at least two years, are certified in multiple CASE courses, and have conducted a CASE Institute as a Lead Teacher for at least two years while mentoring another Lead Teacher. CASE staff will make every effort to provide a CASE Institute Host with one experienced Lead or Master Teacher and either another returning Lead Teacher or a new Lead Teacher.

CASE provides Lead Teachers with professional development prior to beginning each summer’s institutes. Lead Teacher Orientation allows Lead Teachers to learn the expectations and protocols for facilitating a CASE Institute. Time is also spent on coordinating common themes to be taught in each course institute. New Lead Teachers are paired with experienced Lead Teachers or Master Teachers to continue the peer-teaching model throughout all levels of CASE professional development.

Once Lead Teacher Orientation is completed in late April, CASE Institute Hosts will be notified of their assigned Lead Teachers. Communication between Lead Teachers and Host Site Coordinators should be frequent to ensure all needs are met. Host Site Coordinators and Lead Teachers should both maintain open lines of communication.

For more information regarding the roles and responsibilities of CASE Lead Teachers and Master Teachers, refer to Appendix A.

**New CASE Institute Host Sites**

CASE staff will help first-time Host Site Coordinators facilitate their CASE Institute. Mentor Hosts can be arranged to help with either first-time CASE Institute Hosts or a site hosting a new course for the first time. CASE staff will provide support at the CASE Institute Host site by arriving a day before the scheduled start date. Lead Teachers typically arrive this day also. The mentoring CASE staff role is to help ensure Lead Teachers have all necessary materials and facilities are adequate for the session. CASE staff will work with the Host Site Coordinator to solve problems and make sure Lead Teachers are prepared. CASE staff will typically stay through the first few days and monitor the progress of the CASE Institute in order to provide feedback to the Host Site Coordinator and Lead Teachers for future institutes.

**CASE Institute Host Role and Responsibilities**

Your role as a CASE Institute Host is to facilitate a CASE Institute by meeting the requirements outlined in this document. CASE Lead Teachers will facilitate all instruction for the CASE Institute; however, they are dependent upon facilities, equipment, supplies, and logistical support provided by the CASE Institute Host.

The following outlines specific expectations required from CASE Institute Hosts. Please be aware that participants at a CASE Institute are exposed to 150+ days of classroom instruction in just 50-100 hours of institute time. The goal of CASE Institutes is to model proper teaching of the curriculum as it was designed. CASE expects a CASE Institute Host to provide facilities and equipment that model the ideal teaching environment for CASE programs within reason.

**Affiliate Post-Secondary Institution**

CASE requires a post-secondary affiliation for all CASE Institute Hosts. If the CASE Institute Host is a post-secondary institution, no further action is required. If the CASE Institute Host is not a post-secondary institution, there must be clear evidence of post-secondary involvement in the planning and facilitation of the CASE Institute. This involvement can be as simple as providing graduate credit and visiting the institute to meet participants, or as significant as facilitating financial support, lodging and meal arrangements, or other CASE Institute Host responsibilities. It is up to the CASE Institute Host and the post-secondary affiliate to determine how that collaboration is defined.
Post-secondary affiliation will lend legitimacy, support, and potential research benefits to the CASE Institute Host and CASE Institute. As CASE looks to the future, it is vital that post-secondary institutions are working with CASE Institute Hosts to provide connections to pre-service teachers, validity in research on CASE, and additional in-state collaboration for CASE certified teachers. While the CASE Institute Host and the post-secondary affiliate will determine the relationship details, CASE expects affiliates to be aware of the responsibilities and efforts made by Host Site Coordinators and support them in any way necessary.

**Website Recommendations**

CASE Institute Hosts are required to have a webpage communicating important information about their institute. The following are suggested items to include on your webpage:

- CASE Institute schedule clearly indicated, including
  - When participants need to arrive in order to check in and attend the orientation session
  - Earliest departure time to avoid missing any scheduled programming
  - Travel time to and from local airports
  - Opening and closing time of class each day
  - Any pre-determined optional evening or weekend activities

- Maps of campus and local community
- Map to and from the nearest airports
- Lodging requirements and/or amenities
  - Linen and pillow requirements if not provided
  - Description of available amenities at lodging site
  - Note any non-standard bed types (loft, X-Long twin, etc.)
  - Check-in times and contact numbers for late check-in
  - Link to hotel website if applicable

- Ground transportation options
- Parking policies and parking pass requirements
- College credit information and enrollment
- Host Site Coordinator contact information and emergency numbers
- Payment submission process, terms, cancellation deadline, and cancellation fee
- Housing Checklist – See Appendix C (Word version is available upon request)

**Classroom and Laboratory Facilities**

CASE recommends the following for all CASE Institutes.

- Provide adequate accommodations for a CASE Institute enrollment of 16-20 participants. Since each participant will have a laptop, notebook, and laboratory equipment at their station, **it is advised to have a space large enough to accommodate 35-40 participants per room.**

- Have a classroom with **table-style** classroom seating. Tables are important because the curriculum involves several projects and mini-laboratory exercises. Participants need adequate space to spread out their equipment, supplies, computers, and notebooks, and meet with their project partners.

- Laboratory space should include access to water and sinks (a wet lab). A full biology or chemistry laboratory is ideal because laboratory equipment is readily available. CASE curriculum uses chemicals including water. Please note that a wet laboratory is not required every day of a CASE Institute. However, it is important that CASE curriculum is taught in sequential order according to design. Therefore, it is best to have a wet laboratory available at all times throughout the CASE Institute. If this is not possible, the Host Site Coordinator and Lead Teachers must work out a very detailed schedule to adjust timing of instruction for wet lab activities.

- Projectors should be available in each room used. Lead Teachers will have their own laptop computers as needed for projection purposes. Document cameras are helpful but not required.
• Access to outdoor space may be needed. Although many CASE activities are enhanced with teaching in real life settings such as a greenhouse or land laboratory farm, CASE curriculum has been designed to accommodate classroom facilities. The Host Site Coordinator and Lead Teachers may decide to utilize outside facilities that your campus provides. This is encouraged but caution is expressed regarding loss of time for transportation to offsite facilities. Often the same learning goals can be met in the classroom. Discuss the need for outside facilities with the Lead Teachers, as each course has differing needs for outdoor work.

• Be sure that seating is comfortable for eight hours of daily use. Laboratories typically have stools or other poor seating options. Participants may be uncomfortable on a lab stool if there are no other seating options, and the learning experience may suffer.

• Lead Teachers will need to have access to the classroom and laboratory at least the day before the CASE Institute starts, preferably two days prior to the first day of instruction. Host Site Coordinators should make arrangements for Lead Teachers to access rooms so they can unpack materials and set up for the institute.

Equipment and Supplies

Specific requirements related to equipment and supplies are listed in a CASE Institute Materials List available in the spring. Please note this is a special CASE Institute Materials List (sent via email to Host Site Coordinators) – not the full Purchasing Manual teachers use for course implementation available on the CASE website.

The following is an overview of general requirements to assist you in making planning decisions prior to communication with Lead Teachers. CASE recommends borrowing much of this equipment from other departments on campus if it is not in current inventory.

Basic Equipment Requirements

• Compound and dissecting microscopes (check CASE Institute Materials List for course specifics)
• Glassware, such as beakers, graduated cylinders, and test tubes
• Heating devices, such as burners, hot plates, and microwaves
• Electrical access for 110 volt power
• Power strips for participant laptop computers
• Measurement instruments, such as electronic balances
• Specialty equipment required for instruction of specific course content, especially for specialization courses

Staffing Requirements

CASE recommends dedicated staff for logistical support to assist CASE Lead Teachers and participants during the institutes. The following sections outline specific staff roles and responsibilities.

Daily Support Staff
Site coordinators or other site staff should maintain refreshments during daily instruction and be available to obtain needed supplies. Staff can be a graduate or work study student if available. Support staff should NOT also be a CASE Institute participant. The Host Site Coordinator should be present for setup, orientation, beginning, and final days of the CASE Institute. They may be free for the rest of the institute as long as other staff are available to provide materials and support to the Lead Teachers in the coordinator’s absence.

Technology Support Staff
All participants and Lead Teachers must have access to the internet on their personal laptop computers. This requirement offers many challenges with connectivity because of security codes and configuring laptops with administrative rights. All participants are informed that the computer they bring must have administrative rights provided to be able to configure systems for outside internet connectivity. It is the CASE Institute Host’s responsibility to provide internet access for all participants and Lead Teachers with their IT department. CASE recommends having an IT staff member attend the opening session to assist connecting Lead Teacher and
participant computers and be on call throughout the CASE Institute to address problems. Participants will be doing research and downloading free software trials to use during the CASE Institute. **Reliable connectivity to the internet and adequate bandwidth is important.**

Participants and Lead Teachers may need access to a computer printer to produce materials for projects. Please plan to accommodate this requirement prior to the start of the CASE Institute.

CASE also recommends having access to a computer lab in case laptop connectivity is troublesome.

**Policing Role of Host Site Coordinator**

Because CASE certification is a strict quality control measure and is typically the basis for college credit and other benefits to the participants, the Host Site Coordinator has a role in assisting Lead Teachers with intervening in any issues that may arise between instructors and participants. Lead Teachers are prepared for pushback from participants and will have strategies to defuse and resolve problems. However, in worst-case situations, the Host Site Coordinator may be called on to assist Lead Teachers with the enforcement of protocols. It is the Host Site Coordinator’s responsibility to intervene to correct problems with participants and be prepared to remove participants from a CASE Institute if they are disruptive to the learning environment. This should only be done after discussion with the regional CASE staff representative.

Participants may also be removed from the institute if the professionalism agreements are violated. If a participant is removed from the institute or the participant fails to meet the requirements for certification, the Host Site Coordinator must contact CASE staff to develop a plan of action. CASE Staff will contact the participant’s school district and inform them that the participant did not complete the institute and the basis for removal and non-certification status.

Should a participant need to leave the institute for any reason and not return, Lead Teachers and Host Site Coordinators should facilitate the return of CASE Institute binders, notebooks, and other printed materials, and the removal of CASE curriculum from the departing participant’s computer. Exceptions may be made if participants are leaving for emergency situations and make plans to attend another institute or work with Lead Teachers to finalize certification. Host Site Coordinators and Lead Teachers should communicate with CASE staff to determine the best course of action.

**Mentoring and Monitoring of Lead Teachers**

CASE carefully selects Lead Teacher candidates and provides them with training to prepare for the rigors of teaching adult learners. Each new Lead Teacher will be paired with an experienced Lead Teacher or Master Teacher to provide support and further professional development. However, when the session begins, stress and nerves can create uncharacteristic responses in people.

Host Site Coordinators, especially teacher educators, can provide important mentoring as they monitor the performance of Lead Teachers. CASE has created a Lead Teaching Performance Rubric that is available by request. This rubric is provided to all Lead Teachers to support each other’s performance, but Host Site Coordinators can use it to encourage, support, and develop excellence in Lead Teachers. Host Site Coordinators can help Lead Teachers grow during institute facilitation and provide support to help assure the experience is great for participants.

If Host Site Coordinators are willing to support Lead Teachers in this way, clearly communicate intentions with the Lead Teachers. CASE does not want the rubric to be used as a formal assessment of Lead Teachers or be perceived as a threat to cause anxiety. Host Site Coordinators should establish a relationship with Lead Teachers first and ask if they would feel comfortable with feedback.

In extreme cases where a Lead Teacher is underperforming, the Host Site Coordinator should communicate to CASE staff. The rubric can be used as an intervention tool to support the Lead Teacher.
Accounting – Registration Fee Collection and Expense Payment

There are important transactions involving funds that must be completed to facilitate a CASE Institute. The budgeting tools provided in a subsequent section of this guide will assist with planning for specific expenses. This section will explain the logistics of receiving funds and paying expenses related to non-Field Test CASE Institutes. Field Tests will be financially managed by CASE. The following is a list of transactions for which CASE Institute Hosts are responsible:

- Invoice school districts for participant registration fee. Billing can begin April 1
- Provide documentation to school districts to establish CASE Institute Host as a vendor
- Receive and deposit checks
- Provide contact information to answer billing questions related to invoices
- Order and pay for all equipment and supplies related to CASE Institute instruction
- Pay for facility fees
- Pay for lodging and meal services for all participants and Lead Teachers
- Provide transportation for Lead Teachers to and from airport before and after CASE Institute and to and from CASE Institute daily
- Pay CASE Certification Fee
  - CASE Certification Fee is $800 per participant for all courses except APB and MSA
  - CASE Certification Fee is $900 per participant for APB and MSA
- Pay CASE Lead Teacher Service Fee of $8,400 for full institutes and $7,000 for fast track institutes. This includes:
  - Lead Teacher stipends
  - Lead Teacher travel expenses

CASE Institute Hosts are NOT financially responsible for CASE staff visits.

Affiliate Professor Designation

CASE encourages post-secondary instructors and professors to participate as a student during a CASE Institute. This is a great experience to enrich personal teaching strategies for inquiry-based instruction using activity-, project-, and problem-based modes of delivery. After completing the CASE Institute, post-secondary staff should fill out the Affiliate Professor Application available on the CASE website. They will then assume the title of CASE Affiliate Professor. This allows them to become a Lead Teacher for CASE Institutes and use the CASE curriculum in their subject area courses or teacher education courses. Affiliate Professors are a critical link in the development of potential CASE program certifications.

A strong affiliate institution provides all of the opportunities mentioned above. As competition grows to become CASE Institute Hosts and provide leadership within various regions of the country, CASE staff will give preference to CASE Institute Hosts that offer credit to students and teachers and have affiliate professors on staff.

Affiliate Professors are expected to complete the entire CASE Institute to be certified. Affiliate Professor participants must register for the CASE Institute prior to the beginning of the session and complete a portfolio checklist during the CASE Institute. Minimum charge for Affiliate Professors is the $800 CASE Certification fee ($900 for APB). If an Affiliate Professor participant travels offsite to attend a CASE Institute, they will be expected to pay the site’s registration costs.

Alternative Schedule Formats for CASE Institutes
Because unique situations present the need for alternative schedules, CASE has developed two options for the delivery of the required hours of instruction. The CASE Institute Host has the choice of which schedule best fits their institution and local participant needs.

CASE mandates that the instruction be both sequential and conducted in consecutive days. Long periods in between days of instruction will be detrimental to flow of the professional development, and management of participants and Lead Teachers will be problematic. CASE curriculum uses spiral design to lead students through the lessons while building on previous knowledge. CASE Institutes model this instructional strategy during the CASE Institute. Therefore, it is very important to provide required hours of sequential instruction in consecutive days.

CASE believes face-to-face instruction is the most effective mode of professional development when involving educational development. CASE recognizes the time constraints of participants but CASE policy is to provide career-changing professional development and excellent resources that will save participants hundreds of hours of development. The face-to-face format ensures quality and effectiveness.

Course Institute Length
Each course requires a specific scope and sequence that has been scheduled for optimal learning. Based on the scope and sequences for the courses, institute lengths are as follows.

<table>
<thead>
<tr>
<th>Course</th>
<th>Standard Schedule</th>
<th>Fast-Track Schedule</th>
</tr>
</thead>
<tbody>
<tr>
<td>AFNR</td>
<td>8 days</td>
<td>Not available</td>
</tr>
<tr>
<td>ASA, ASP, NRE, ESI</td>
<td>8 days</td>
<td>5 days</td>
</tr>
<tr>
<td>APT, APB, FSS, MSA</td>
<td>9 days</td>
<td>Not available</td>
</tr>
<tr>
<td>ARD</td>
<td>Online Only</td>
<td></td>
</tr>
</tbody>
</table>

Note that Field Test Institutes will vary in length and may be tentative until the course is finalized in the spring.

Short-Lunch Standard Schedule - RECOMMENDED
- Registration and Orientation Session the evening prior to opening morning
- Class from 8:00am to 5:00pm all days except final day
- Last day ends at 12:00pm
- Lunch is 1 hour (12:00pm-1:00pm) – only for sites that have lunch catered to class area

Fast Track Schedule (Short lunch required)
- Registration and check-in (if lodging is needed) evening prior to opening morning
- Orientation Session opening morning
- Class from 8:00am to 5:30pm all days
- Lunch is 1 hour (12:00pm-1:00pm) – lunch must be catered to class area
- Fast Track participants must have a prior CASE certification (AFNR preferred) or complete an online CASE pedagogy course prior to institute

Long-Lunch Standard Schedule
- Registration and Orientation Session the evening prior to opening morning
- Class from 8:00am to 5:00pm for all instructional days
- Ends last day at 5:00pm
- Lunch is 1 1/2 hours (11:30am-1:00pm) – recommended for sites that use cafeteria lunches that require a long walk to and from the classroom or off-site lunches where participants must drive to get lunch

CASE Institute Session Format Considerations
- CASE recommends a Sunday or Monday evening Orientation Session for all eight-day institutes
- CASE recommends a two-day break over the weekend – six day weeks not recommended
Orientation Session Specifications

The evening prior to the start of the institute is an important evening for many reasons. This session provides you and your staff time to welcome participants and set the tone for next several days of interaction on your campus. The following table is a draft schedule of events for this session and business that should be conducted.

Table 2. Orientation Session Draft Schedule

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>4:00p</td>
<td>Registration</td>
<td>Check-in participants, collect remaining fees, provide a packet of information including:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Campus maps</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Meal cards</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Room keys or assignments</td>
</tr>
<tr>
<td>5:30p</td>
<td>Banquet/Dinner</td>
<td>A kick-off banquet meal is strongly encouraged. This provides time for everyone to settle in and a structured forum to disseminate information.</td>
</tr>
<tr>
<td>6:15p</td>
<td>Presentation</td>
<td>Host Site Coordinator should be prepared to present the following information:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Welcome</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Participant introductions</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• CASE Staff and/or Lead Teachers introductions</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Campus logistics</td>
</tr>
<tr>
<td></td>
<td></td>
<td>o Where to meet at 8:00am the next morning</td>
</tr>
<tr>
<td></td>
<td></td>
<td>o Meal plans for any non-catered meals</td>
</tr>
<tr>
<td></td>
<td></td>
<td>o Lodging information</td>
</tr>
<tr>
<td></td>
<td></td>
<td>o What to do/where to go for evening activities</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Time for campus or school administrators to welcome participants</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Time for the sponsoring university to address the group and offer college credit options</td>
</tr>
<tr>
<td>7:00p</td>
<td>Technology Session</td>
<td>Lead Teachers should facilitate the following tasks:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Curriculum download and installation (do not need CASE Institute Notebooks)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Internet access setup</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Other software downloads</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Participant laptops are required</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Need IT Support available</td>
</tr>
<tr>
<td>7:30p</td>
<td>Closure</td>
<td>• Finish technology troubleshooting</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Dismiss</td>
</tr>
</tbody>
</table>

Budgeting Guidelines for CASE Institutes

CASE Institute Hosts are encouraged to keep the total cost of the CASE Institute at approximately $2500-$3000 per participant. The fixed and variable costs are outlined below. Affiliate institutions are also responsible for the cost of lodging and meals for each Lead Teacher as reflected in the budget. A maximum of 20 participants is enforced to facilitate the optimal student-teacher ratio required for this type of intense laboratory-based instruction.

Each site should carefully develop its own budget. The following budget does not include equipment – the numbers for supplies only reflect consumables.

Table 3. CASE Lead Teacher Service Fee
### Table 4. Variable CASE Institute Costs

<table>
<thead>
<tr>
<th>Variable Cost per Participant</th>
<th>Standard Rate</th>
<th>Fast Track Rate</th>
<th>APB/MSA</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CASE Certification Fee</td>
<td>$800</td>
<td>$800</td>
<td>$900*</td>
<td>*Includes pre-session textbook</td>
</tr>
<tr>
<td>Food/Meals</td>
<td>$326</td>
<td>$204</td>
<td>$326</td>
<td></td>
</tr>
</tbody>
</table>
| Participant Lodging           | $275 - $875   | $172 - $547     | $275 - $875 | Dorms average $275  
|                               |               |                 |         | Hotels average $875 |
| Lead Teacher Lodging/Meals†   | $100          | $100            | $100    | Lead Teacher expenses while facilitating session |
| Postage/Shipping              | $15           | $15             | $15     |             |
| Printing                      | $18           | $18             | $18     | Participant Notebooks |
| Shirts                        | $27           | $27             | $27     | Based on Mr. Monogram |
| Variable/Person for Dorm      | $1,561        | $1,336          | $1,661  | Total Variable Cost Estimate |
| Variable/Person for Hotel     | $2,161        | $1,711          | $2,2161 | Total Variable Cost Estimate |

† - Based on a 16 participant enrollment

CASE has developed a CASE Institute Calculator to assist you in budget comparisons. To use the CASE Institute Calculator, please go to the CASE Institute Host Planning Group on NAAE Communities of Practice at [http://communities.naae.org/groups/case-institute-host-planning-group](http://communities.naae.org/groups/case-institute-host-planning-group).

Please note that no allowances are budgeted for institution facility fees or staff salaries. These fees are discouraged as CASE focuses on keeping the registration fee for participants as low as possible and consistent among various CASE Institute Host sites. Each CASE Institute Host must develop a budget that protects their needs. Each CASE Institute Host will set their own registration fee and report this to CASE staff for registration purposes. The following sections provide specific information related to items listed in the budget.

### CASE Certification Fee

The CASE Certification fee is an $800 ($900 for APB) charge for each participant upon his or her certification for each CASE course. This fee is instituted to recover costs and support teacher services related to the CASE curriculum. CASE curriculum materials are provided at no charge to certified CASE teachers. Separate financial resources contributed by public and private sources fund the development of curriculum resources.

The following is a list of costs associated with the staff positions to support CASE implementation:

- publishing and duplication of curriculum resources;
- marketing related to specific courses;
- staff support for on-going teacher services;
- revision of curriculum;
- CASE Institute registration and certification records;
- planning and facilitation of professional development for Lead Teachers; and
- CASE Institute Scope and Sequence development and publication.

For more information about the CASE Certification Fee, please contact the CASE Project Director for the official policy statement.
CASE Lead Teacher Service Fee

As noted previously in the Planning Guide, the CASE Lead Teacher Service Fee is $8,400 for standard institutes and $7,000 for fast track institutes. This fee covers the costs of Lead Teacher expenses related to a specific institute. This fee was initiated to ease the accounting responsibilities of CASE Institute Hosts. Each site will be billed for the Lead Teacher Service Fee upon completion of the CASE Institute. This is to provide CASE compensation for incurred travel expenses and to expedite stipend payments to Lead Teachers. Each site has a May 1 cancellation deadline to prevent them from committing to this expense.

The CASE Lead Teacher Service Fee includes
- the stipend for each Lead Teacher;
- incidental expenses during travel for each Lead Teacher; and
- travel expenses for each Lead Teacher.

Equipment and Supplies

As stated in the planning guide previously, the CASE Institute Host will be responsible for providing all necessary equipment and supplies for facilitating each CASE Institute. CASE has arranged special pricing for CASE Institute Hosts. For example, Vernier offers a 15% discount and free shipping to CASE Institute Hosts when ordered through the CASE Store. Contact the CASE Operations/Outreach Director for more information and to order. The following is an outline of suggestions and recommendations for specific equipment and supplies.

Equipment Disclosure

Because equipment is considered long-term and held as inventory at an institution, CASE will not reimburse or purchase equipment for a CASE Institute Host. Please note that costs associated with equipment and supplies are not reflected in the budget. A detailed list of required equipment and supplies for the scope and sequence of instruction for a CASE Institute is provided by CASE staff. Host Site Coordinators SHOULD NOT use the full CASE Purchasing Manual, which is listed on the CASE website. The complete purchase manuals for classrooms include equipment and supplies not used during the CASE Institute.

LabQuest® and Bio-Rad® Equipment Requirement

Each CASE course has been designed utilizing specialized equipment from Vernier (all courses) and Bio-Rad Laboratories (APB only). CASE recommends each CASE Institute Host purchase a set of 10 LabQuest2 interfaces and 10 of each sensor required for the specific course offered. Note that AFNR contains many sensors needed for other course offerings.

For specific costs related to Vernier equipment purchasing please refer to the CASE Institute Materials List for your institute and select the Vernier tab. Please contact the CASE Operations/Outreach Director for special CASE Institute Host pricing.

Consumables

CASE Institutes use a fair quantity of consumable supplies. You can find a detailed list of what is needed for CASE Institute sessions in the course CASE Institute Materials List. The list will include items that should be purchased locally and are time sensitive, since some items are perishable. Please work with your Lead Teachers as to when these supplies should be ordered. Ward’s shipments for ASA, ASP, and NRE will be arranged by CASE with Host Site Coordinator approval to arrive on the appropriate date based on your institute schedule. AFNR, ASA, and ASP have live items that will be arranged with Ward’s. If you are hosting AFNR, please check your state laws about using elodea and order accordingly.
CASE requires the appropriate supplies be available on site at least the day before the CASE Institute is scheduled to start. This allows the Lead Teachers time to sort and prepare materials for instruction. The Host Site Coordinator must plan accordingly to ensure the delivery of all necessary supplies. Some consumables may be perishable or need to be purchased at a specific time relative to the institute, especially for FSS. Communication with Lead Teachers is vital to ensure required supplies are available when needed.

CASE has negotiated packages and special deals with vendors for some supplies. It is recommended to use CASE vendors (as provided in the CASE Institute Materials Lists); however, a CASE Institute Host is not required to purchase items through CASE recognized vendors. Regardless, order supplies as early as possible as teachers place order at the end of the school year to utilize residual funds. Because of this, many vendors experience delays in processing orders or run out of inventory. **DO NOT wait until the last minute for ordering from vendors.**

**Please note:** ASA, ASP, and NRE sites, CASE will order Ward’s Scientific supplies for your site. This change is made to accommodate inventory shortages of preserved specimens in summer months and provide CASE Institute Hosts an additional discount. Remember, live items will not be shipped immediately upon order; CASE will arrange shipment based on your institute’s start date.

**Textbooks and Software**

Most CASE courses utilize a primary textbook and optional textbooks as a supplement to the curriculum. Cengage Learning, American Technical Publishers, and Goodheart-Wilcox Publisher are the vendors for CASE supplementary textbooks. CASE will coordinate complimentary textbook delivery for participants at your session if textbooks are available from the publisher. Courses that may include free textbooks from the publisher are ASA, ASP, APT, NRE, FSS, and ESI. Textbooks for APB are mandatory and will be shipped to participants early for pre-reading and discussion with the Lead Teachers.

Newbyte software is a part of both ASA and ASP coursework, and may be provided as a trial for participants during those institutes.

**Participant Shirts**

Each participant should receive a polo shirt with the CASE emblem embroidered on the front left chest. The CASE Institute Host will be responsible for ordering the correct number and sizes for the participants and will be provided size information during the registration process. CASE polo shirts can now be ordered from the CASE store. If the CASE Institute Host chooses to use their own vendor, the Host Site Coordinator should contact the CASE Operations/Outreach Director for the CASE logo. The CASE logo is provided upon request. The CASE Institute Host logo or name is encouraged to be included on the shirts as well.

**Printing**

The CASE Institute Host is in charge of printing for the participant binders. There is a significant amount of printing required and can typically be done economically through institution print shops. CASE staff will set up a Dropbox or Google Drive folder that includes the printing required for each CASE Institute. This folder will include all necessary printing for the binder documents, activity-specific pages, and orientation meeting packets, as well as printing instructions. Limited photocopy and computer printing may be needed during the institute.

**Lodging for Participants and Lead Teachers**

The CASE Institute Host must arrange for lodging for all participants and Lead Teachers. **Lead Teachers will be arriving at least one day prior to the opening session of the CASE Institute,** and all participants should check in the day of the opening session (unless out of state travel requires additional nights).

CASE strongly recommends that all participants, regardless of home proximity, plan to stay in lodging provided by the institution. This aspect is important to foster professional learning communities that are created during the course of the CASE Institute. Participants have homework every night that may involve group projects or
other collaborative work. CASE encourages environments that keep participants focused on institute instruction to maximize benefits to participants.

CASE recommends that a CASE Institute Host does not discount registration fee for participants who opt out of staying in arranged housing. The value of the collaborative experiences is too valuable and separation from the cohort should not be encouraged or facilitated.

If participants wish to commute to and from the session each day, the Host Site Coordinator must establish an agreement with the participant(s) in order to communicate expectations before the first day of instruction. The Host Site Coordinator should use the CASE Institute Commuter Memorandum of Understanding document. This document will provide communication of expectations to avoid potential issues if a commuter fails to become certified due to missing class time.

**Dormitories**

The nature of the CASE Institute experience is taxing on participants and Lead Teachers. Individual hotel rooms, while ideal, are cost prohibitive in some settings. In the past, institutions have successfully used dormitory facilities.

CASE Institute Hosts should ensure that dormitory facilities are in very good condition, including being clean, air-conditioned, and near the teaching facilities. In a dorm setting, each participant should have their own room unless the dorms are apartment style with multiple bedrooms for privacy. Participants are not students. They are professionals and should be treated as such. Any unusual bed types should be communicated to participants, as some participants may be unable to use loft beds or other non-standard beds.

Lead Teachers must have their own dorm rooms to provide personal space and preparation time. These individuals will be with each other for several hours each day and need proper space to recharge.

**It is vital to communicate dormitory accommodation needs to participants and Lead Teachers.** Some dormitories require guests to bring linens and toiletries. If dormitories are listed as apartment style, CASE Institute Hosts must also communicate amenities available – kitchenette, laundry, etc. It is the Host Site Coordinator’s responsibility to make sure all guests are aware of these extra requirements. Please use Appendix C – Housing Checklist as a template for listing appropriate items participants may wish to bring with them or purchase once onsite. This should be posted on your website and communicated directly to registered participants with your welcome letter at least two weeks prior to start date.

**Hotel Accommodations**

If a hotel is a feasible option to provide lodging, it is recommended. Hotel rooms offer more comfort to the guest than most dormitories. Participants from previous institutes have reported that hotel accommodations were appreciated because of the length of the CASE Institute.

It is recommended to allow participants the choice to have their own hotel room if they choose to pay the difference of sharing a room. This option, along with the price, should be communicated to participants prior to the CASE Institute via your website and welcome letter. If participants choose to have their own hotel room, provide an invoice for their review and payment.

Please note that Lead Teachers should have their own hotel room for the duration of their stay. The CASE Institute Host will cover the expense of the Lead Teachers’ lodging.

**Meals for Participants and Lead Teachers**

CASE Institute Hosts must provide meals for participants and Lead Teachers. Pre-loaded Visa cards or campus food service (if flexible enough to meet participant needs during a two-week stay in the summer) are recommended if available. Visa cards allow flexibility in menu choices and make budgeting easy. Catering is an excellent option for lunches.
It is recommended to consider a group meal hosted off site for a few evenings to get participants out of familiar surroundings. Weekend meals are optional depending upon your services. If weekend meals are unavailable, the CASE Institute Host must communicate this to participants at registration, in the welcome letter, and on the website so they can make arrangements.

CASE Institute Hosts must also provide snacks and drinks during the days of instruction. Refreshments are important to keep the energy of participants up during long hours of instruction.

Lead Teachers must be provided meals for the duration of their stay. Lead Teachers receive a $200 voucher for personal expenses not covered by the CASE Institute Host during the instructional week. If weekend meal service is not available for Lead Teachers, they are instructed to use their personal voucher money.

Please note that CASE registration collects information about food allergies from participants. This information is provided to you in your registration updates. It is necessary to make accommodations for participants with food allergies. Please contact them prior to the session to determine the best way to accommodate their dietary needs.

**Transportation**

If distance to the classroom is beyond a reasonable walk from lodging, your site will need to provide transportation. In most situations, plenty of local participants are available to help shuttle other participants to and from the meeting site. Before depending on local participants, please verify their availability and willingness to provide that service. Some hotels offer a shuttle service but these are sometimes unreliable. Be sure to have a plan for transporting participants.

**Host Site Coordinators must arrange transportation for Lead Teachers.** Lead Teachers will arrive one day prior to the start of the session. Although CASE will try to have a regional Lead Teacher facilitating your site who drives to the institute and could pick up the other Lead Teacher from the airport, this arrangement is not guaranteed. Please assume Lead Teachers will require transportation and have a plan to provide Lead Teacher transportation to and from the airport.

In addition to airport transportation, Lead Teachers will need to arrive at teaching facilities early each morning and stay later in the evening. Lead Teachers must have access to convenient transportation during the institute, and should not be dependent upon the graciousness of a participant. Host Site Coordinators are responsible for providing CASE Lead Teachers with this transportation. CASE does not provide rental cars for Lead Teachers.

**College Credit Options and Considerations**

Teachers have various requirements for licensing that may include professional development credits. CASE will provide certificates to successful participants that indicate they completed the required institute hours of professional development. However, many teachers require graduate or license renewal credits earned through an accredited institution.

CASE recommends that a CASE Institute Host provide participants an opportunity to earn graduate level credits for successful completion of a CASE Institute. The institution determines the range of credit hour offering but typical previous offerings were 3-6 hours of graduate level credits. Participants are required to pay for the costs of these credits if they choose to take advantage of the graduate credit available.

If the CASE Institute Host intends to offer credit to participants, they are responsible for communicating how and when to complete the enrollment process, as well as credit cost. The CASE Institute Host or offering institution can impose additional requirements for earning the credit; however, CASE has an assessment protocol to verify certification of participants already in place that may be used to verify successful completion of the institute. If a CASE Institute Host is not able to offer graduate credits, please contact your regional CASE staff representative who will put you in touch with universities who offer graduate credit for CASE participants completing an institute in any state.
Registration

CASE will process all participant registrations online through the CASE website. Registration will open December 1. Each Host Site Coordinator will be provided a monthly updated list of participants to send official communications. Each participant submits information including contact, transportation, shirt size, and dietary needs. This information will be sent in a registration report to CASE Institute Hosts monthly after registration begins, and every two weeks in May. This report will include cancellations. After June 1, every individual new registration will be communicated to CASE Institute Hosts immediately. Early CASE Institutes will be sent each individual registration starting in May. Host Site Coordinators determine when registration should be closed for the institute.

CASE will set the maximum capacity for online registration at 18 participants. This allows each CASE Institute Host the flexibility to add an additional two participants at their discretion. CASE will not allow session enrollment to go above 20 participants. Host Site Coordinators will be informed when your site has reached 18 registrations and you will have the authority to choose participants for the remaining two seats or release these seats as open to other participants. Once you have determined the two participants for the remaining seats, contact the Professional Development/Online Learning Coordinator, who will open registration for them.

Waiting List

In the past, some sites that reached capacity early in the registration period started a waiting list. CASE encourages sites to do this since participants may cancel before the start of the session. CASE does not manage waiting lists. CASE will automatically allot three waiting list seats on the registration form. The waiting list will become available once the first 18 seats are full in the registration system. Host Site Coordinators are responsible for contacting those on the waiting list regarding their registration status.

Private State or Regional Sessions

If your state or region wishes to host a CASE Institute that is open only for targeted participants, CASE can facilitate this request. Registration for private sessions must still be handled through the CASE Institute online registration system; however, enrollment will be closed until the time you specify. If your site wishes to hold only part of the available seats, CASE can lower the maximum capacity to provide guaranteed seats for targeted participants.

Participant Registration Cancellation

The cancellation fee has been implemented to reduce the number of last minute cancellations or no-show registrations. CASE will announce that sites may charge a cancellation fee of $250 for registration cancellations made within 30 days of the start of the institute. In situations of no-show registrations without prior notice, the non-refundable fee will be $1000, and is adjustable based on costs that CASE Institute Hosts cannot recoup. CASE Institute Host websites should also include cancellation and no-show policies. Host Site Coordinators determine if they wish to apply the fee, and manage invoicing and collection.

Pre-Service Participants

Pre-service teachers are welcome to participate in CASE Institutes for the following courses: Introduction to Agriculture, Food, and Natural Resources (AFNR), Principles of Agricultural Science – Animal (ASA), Principles of Agricultural Science – Plant (ASP), Agricultural Power and Technology (APT), and Natural Resources and Ecology (NRE). The online registration system will identify pre-service teachers during the registration process for ease of processing and tracking pre-service certification. The following guidelines ensure consistency in the participation of pre-service teachers.

- Pre-service participants must register using the registration form on the CASE website. They must denote their pre-service teacher status during registration process.
• Pre-service participants must complete only the top teacher section of the School District Agreement form, denoting their pre-service status, and submit the form prior to the start of the institute.

• Pre-service participants will be charged $100 of the $800 CASE certification fee. This fee will be denoted on the invoice from CASE.
  o Upon receipt of the $100 and successful completion of CASE certification requirements, pre-service teachers will be considered probationary certifications until hired.
  o The balance of the fee will be billed to the hiring school district upon hiring. Probationary certified teachers must complete a Change of School form upon hiring (available on the CASE website). School districts and newly hired CASE-certified teachers must sign the CASE School District Agreement and pay the balance of the CASE certification fee in order for full certification status to be awarded.
  o If probationary certified teachers do not register their new school and pay the remaining balance of the CASE certification fee, the teacher will not be eligible for CASE assessments, CASE Online, CASE store, updated versions of the curriculum, or any other CASE teacher services. The remainder of the certification fee must be paid for the pre-service teacher to become FULLY CASE CERTIFIED.

• Additional registration fees may be charged to pre-service participants at the discretion of the CASE Institute Host to cover the use of materials and equipment, facilitation provided by Lead Teachers, polo shirt, meals, etc.
• If funding is available, pre-service participants may choose to pay the full CASE Institute registration fee and bypass the pre-service probationary status.
• Pre-service participants must complete the specified number of hours for the CASE course in which certification is being offered.
• Pre-service participants, in conjunction with Lead Teachers, must complete the CASE Institute Portfolio Checklist for the CASE course being offered. This checklist must be submitted to CASE staff upon successful completion of certification requirements.

Special Registration Requirements

Some courses have special registration requirements in order to provide the best possible CASE Institute experience and implementation of CASE curriculum. The courses which have special requirements include ARD, APB, and any Field Test course.

Agricultural Research and Development (ARD)

Because ARD is a capstone course, there are specific requirements in place for participants who wish to register. In order for teachers to take full advantage of the ARD curriculum, they or their program must have certification and implementation of a full pathway sequence of CASE courses. The following outlines ARD participant requirements.

• Be certified in at least one full pathway (Animal, Plant, Natural Resources, or Agricultural Engineering).
• Implement one of the pathway specialization courses for at least one year.
• If the teacher is not individually certified in a full pathway, they must be in a multiple teacher program where a full pathway is implemented.
• Prepare prior to the institute by completing pre-institute homework, including reading assignments and responsive homework assignments.

Animal and Plant Biotechnology (APB), Food Science and Safety (FSS) and Mechanical Systems in Agriculture (MSA)

As specialization courses with rigorous laboratory and research protocols, participants in APB, FSS and MSA should be prepared for a highly intense professional development experience. In order to be successful at the APB, FSS and/or MSA CASE Institutes, participants must meet the following criteria.

• Hold at least one CASE certification and have implemented the certified course for at least one year OR have teaching experience in biotechnology or food science and safety as appropriate
• For APB only, prepare prior to the institute by completing pre-institute homework, including textbook reading assignments and responsive homework assignments. The textbook will be mailed before the institute to facilitate pre-institute preparation.

Site Cancellation

The Host Site Coordinator must provide the regional CASE staff representative notice of site cancellation by May 1 if they feel enrollment is not enough to make the institute feasible. CASE will cancel the session and contact registered participants to facilitate registration to other institutes.

Participant Expectations

Participants must agree to and sign a Participant Expectations Agreement before taking part in a CASE Institute. In general, the agreement outlines professional expectations of participants. Following are some key expectations for all participants at a CASE Institute.

• Arrive on time for opening day with a laptop and administrative rights.
• Arrive on time for all daily class sessions (attendance will be taken).
• Actively participate in required hours of classroom instruction.
• Complete all assignments given by Lead Teachers, whether they are on the check sheet or not, and assemble an Agriscience Notebook.
• Attend evening sessions, if necessary.
• Turn off all cell phones during class instruction.
• Treat all participants and instructors professionally and with respect.
• Continue to review and become familiar with all curriculum material and work toward mastery after leaving the institute.

Absentee Agreements

CASE has two agreements that allow participants to miss scheduled institute time in case of conflicts outside their control. These agreements are to be used only in special cases of pre-arranged absence for valid reasons or in emergencies. The following agreements are available.

• CASE Institute Participant Absentee Agreement – this agreement is a pre-arranged contract between the teacher, administrators from their school, and the CASE Lead Teachers. The agreement clearly outlines the reason for the unavoidable absence and provides terms for remedial work to account for missed time at the session. The Lead Teachers will work with the participant to define pre-session homework, extra work during the session, and/or post-session work. Lead Teachers may also identify the hours of extra time they will put in. The school district or participant will compensate these extra hours.
• CASE Institute Illness or Emergency Agreement – this agreement is used between the participant and the Lead Teachers in the case of a situation that requires the participant to be absent from the institute classroom time after the institute has started. Terms are similar to the absentee agreement. These agreements are not to be shared as an option for participants to use in non-critical situations. CASE staff will monitor all agreements and Lead Teachers have the right to refuse an agreement for any reason.

Weekend Activities for Participants and Lead Teachers

It is encouraged to provide options or schedule activities for the weekend. Many out of state guests will be interested in seeing your local community and will need help with ideas and logistics to do so. CASE Lead Teachers and participants will appreciate the opportunity to get off campus and spend a few hours unwinding at your local attractions. Participants may schedule some of these activities on their own; however, scheduling some off-site activities that are communicated to all participants encourages a sense of community and good will between participants and CASE Institute Hosts.
Appendix A – Lead Teacher Roles and Responsibilities

CASE Institute Lead Teachers must possess a rich understanding of the CASE curriculum they teach and demonstrate solid teaching practice. Lead teachers model the standard of excellence expected for all CASE teachers. Besides providing instruction to CASE Institute participants, Lead Teachers serve as a resource for these teachers throughout the school year. They may be called upon to develop curricula, instructional support materials, and course assessments or to facilitate ongoing aspects of CASE development.

Lead Teacher Roles and Responsibilities

The following offers an overview of the roles and responsibilities that Lead Teachers fulfill, and is not inclusive of all of the expectations of these individuals.

**Professional Development related:**
- Participate in ongoing professional development
- Remain current with curriculum updates and revisions
- Remain current with course-related software and hardware updates

**Program Quality related:**
- Test and evaluate hardware and software as needed
- Pilot and submit comments on new programs or curricula when requested
- Work in collaboration with other professionals to develop and implement instructional material, curricula and staff development opportunities

**Core Training related:**
- Attend all CASE Lead Teacher Orientation sessions
- Be available as a resource for teacher support during the school year
- Work collaboratively with an assigned teaching partner to develop an effective instructional strategy for the specific CASE Institute agreed to teach
- Share equally in the preparation of course material for the CASE Institute
- Share equally in the teaching responsibilities during the CASE Institute
- Share equally in offering evening enrichment sessions for participants
- Demonstrate in-depth understanding of the full scope and breadth of the specific CASE course curricula
- Treat teachers professionally, recognizing individual differences that distinguish one teacher from another, so that instruction can be modified when appropriate
- Have subject area expertise and demonstrate excellent communication and instructional methodology skills
- Create an instructional atmosphere that is conducive to all learners
- Serve as an instructional role model for all CASE teachers
Appendix B – CASE Institute Planning Check List

The following is a checklist and timeline that Host Site Coordinators can use as a guideline. Each site will have its own specific needs. Dates will need to be modified and adjusted according to specific CASE Institute dates.

<table>
<thead>
<tr>
<th>Time Line</th>
<th>Task</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall</td>
<td></td>
<td></td>
</tr>
<tr>
<td>September 15</td>
<td>Set dates for CASE Institute</td>
<td></td>
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<tr>
<td></td>
<td>Determine course to be offered</td>
<td></td>
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<tr>
<td>November 15</td>
<td>Submit CASE Institute Host Application</td>
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</tr>
<tr>
<td></td>
<td>Publish by December 1 Develop website to provide specific participant information for your institute. Send link to CASE Operations/Outreach Director to be posted on the CASE website.</td>
<td>Dates Registration fee and billing information Cancellation policies Housing information Travel logistics and other locale specific information</td>
</tr>
<tr>
<td></td>
<td>November 15 Submit CASE Institute fees and website link to CASE</td>
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<tr>
<td>Early Spring</td>
<td>Work with CASE staff to identify affiliate professors and technical support staff available at the CASE Institute</td>
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<td></td>
<td>Reserve classrooms, laboratories, and meeting space. Resolve security and storage issues.</td>
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<tr>
<td></td>
<td>Arrange housing needs for participants</td>
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<tr>
<td></td>
<td>Arrange audio-visual and internet support for classrooms</td>
<td></td>
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<tr>
<td></td>
<td>Reserve location for opening day orientation and final closing</td>
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<td></td>
<td>Arrange food service or system for meals (i.e. campus debit card – be sure food service system can handle institute numbers and appropriate meal flexibility during the summer)</td>
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<tr>
<td>April</td>
<td>Inventory existing class equipment and supplies. Compare list with CASE Institute equipment list to determine what will need to be ordered. (remember, do NOT use course purchase manuals for institutes)</td>
<td>OPTIONAL – Schedule weekend excursion for participants staying through connecting weekend</td>
</tr>
<tr>
<td></td>
<td>OPTIONAL – Order giveaways for participants (i.e. lanyards, cups, etc.)</td>
<td>OPTIONAL – Order giveaways for participants (i.e. lanyards, cups, etc.)</td>
</tr>
<tr>
<td>May</td>
<td>By May 1 Send notice of cancellation to CASE staff if necessary</td>
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<tr>
<td></td>
<td>Communicate with all waitlist registrants on status</td>
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<td></td>
<td>Prepare information packets to be mailed or emailed to participants. More specific logistical information should also be posted to your CASE Institute website. Greetings and Host Site Coordinator introduction – who to contact with questions Lodging information –amenities and items needed Travel information – local/regional airports, recommended arrival and departure times, travel time to airports, shuttle information, maps for drivers, specific locations for orientation, registration, and class Housing checklist</td>
<td></td>
</tr>
<tr>
<td>Time Line</td>
<td>Task</td>
<td>Notes</td>
</tr>
<tr>
<td>------------------------</td>
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</tr>
<tr>
<td>One Month Prior</td>
<td>Arrange local IT support for any equipment needs; schedule help for opening evening session</td>
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<tr>
<td></td>
<td>Purchase/order needed classroom/office supplies</td>
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<tr>
<td></td>
<td>Arrange for parking passes and maps</td>
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<tr>
<td></td>
<td>Arrange opening day meal</td>
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<td></td>
<td>Send email with items to bring housing information to participants</td>
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<td></td>
<td>Send housing list to Housing Office/hotel</td>
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<td></td>
<td>Order CASE shirts</td>
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<tr>
<td>One Week Prior</td>
<td>Purchase local non-perishable supplies</td>
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<tr>
<td></td>
<td>Check vendor shipments for completeness</td>
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<td></td>
<td>Print name badges</td>
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<td></td>
<td>Plan orientation agenda</td>
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<td></td>
<td>Print Opening Session packet (one per participant and Lead Teacher)</td>
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</tr>
<tr>
<td></td>
<td>Print and compile notebooks (one per participant and Lead Teacher)</td>
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<td></td>
<td>Print any special printing for activities</td>
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<td></td>
<td>Provide participant list to Lead Teachers</td>
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<tr>
<td></td>
<td>Prepare and print registration check-in list for participants</td>
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<tr>
<td></td>
<td>Secure classroom/laboratory keys for Lead Teachers</td>
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<tr>
<td></td>
<td>Confirm opening day meal</td>
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<td></td>
<td>Confirm with housing: housing list, registration, security cards</td>
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<td></td>
<td>Confirm with IT support set-up date and time</td>
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<td></td>
<td>Sort equipment and supplies by type</td>
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<tr>
<td>One Day Prior to Kickoff</td>
<td>Provide transportation to Lead Teachers from airport to lodging and classroom as needed</td>
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<tr>
<td></td>
<td>Work with Lead Teachers to prepare classroom facilities and arrange supplies (Lead Teachers will arrange with you)</td>
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<tr>
<td></td>
<td>Discuss with Lead Teachers schedule for purchasing perishable supplies</td>
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<td></td>
<td>Provide Lead Teachers with keys for building and classroom access</td>
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<tr>
<td>Kickoff Day</td>
<td>Conduct Lead Teacher meeting</td>
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<tr>
<td></td>
<td>Set up registration</td>
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<td></td>
<td>Check in participants</td>
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<td></td>
<td>Conduct Orientation Meeting with Lead Teachers</td>
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<tr>
<td>First Week of CASE Institute</td>
<td>Contact schools for invoicing and/or payment not received</td>
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<tr>
<td></td>
<td>Confer with Lead Teachers about perishable items and dates needed</td>
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<td></td>
<td>Keep classroom snacks and drinks replenished as needed</td>
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<td></td>
<td>OPTIONAL – Provide class field trip information; confirm participants attending and transportation</td>
<td></td>
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<tr>
<td>Second Week of CASE Institute</td>
<td>Organize shirts and certificates to be given out</td>
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<tr>
<td></td>
<td>Plan closing agenda</td>
<td></td>
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<tr>
<td></td>
<td>Keep classroom snacks and drinks replenished as necessary</td>
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<tr>
<td>Time Line</td>
<td>Task</td>
<td>Notes</td>
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<td></td>
<td>Meet with Lead Teachers regarding cleanup and organization of CASE Institute equipment and supplies; develop list of any consumables used up that need replenished</td>
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<td>OPTIONAL – Host a closing dinner or social one of the last nights</td>
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<tr>
<td>Last Day</td>
<td>Take group picture with CASE Institute shirts</td>
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<td></td>
<td>Assist Lead Teachers with collection and copying of all participant portfolio check sheets. Mail one set to CASE Operations/Outreach Director; return one set to participants.</td>
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<td></td>
<td>Have participants complete surveys online (Lead Teachers will facilitate)</td>
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<td></td>
<td>Collect any borrowed materials that need returned</td>
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<tr>
<td>Shut Down</td>
<td>Collect all class keys from Lead Teachers</td>
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<td></td>
<td>Have Lead Teachers help move equipment and supplies to designated storage</td>
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<tr>
<td>Within One Month After</td>
<td>Pay bills, file and record invoices</td>
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<td></td>
<td>Submit payment for CASE Certification and Lead Teacher Service Fees</td>
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<td></td>
<td>Review CASE Institute Host Report from CASE staff</td>
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<td></td>
<td>Create list of discussion items for CASE Institute Debrief conference call</td>
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Appendix C – Housing Checklist

The following is a housing checklist to provide your participants prior to arrival at your institute. Please delete and add specific site requirements – this is only a template. The Word version of this document is available on Communities of Practice.

Housing Checklist – What to Bring to the CASE Institute

In order to ensure that your experience at the CASE Institute is as pleasant as possible, participants may wish to consider bringing the following items with them or purchase locally once at site.

Bedding and Bath Items (Dorm)

Please note that for dorms a linen packet should be provided each week. However, additional items are listed for consideration.

- Heavy Blanket
- Pillow Top/Egg Carton Bed Cushion
- Extra Pillow
- Extra Shower Towels

Clothing

- Ten days’ worth of clothing – CASE Institutes are casual dress
- Khaki dress pants (picture day)
- Closed toed shoes for labs
- Favorite pair of safety glasses and/or goggles
- Comfortable Walking Shoes
- Boots or outdoor shoes for soil pit
- Raincoat
- Sweatshirt (A/C classroom)

Equipment/Appliances

- Cell Phone
- Television (dorms)
- Laptop (required and you must have administrative rights to add software)
- Alarm Clock
- UL Approved Extension Cords
- Coaxial Cable (for cable television in dorms)
- CAT 5 Cable (for internet access in dorms)
- Fan

Kitchen Supplies (Dorm)

- Cleaning Supplies (Paper towels and spray cleaner)
- Food Service Utensils
- Cups
- Food Containers
- Zip Lock Bags
- Snacks

Laundry Items

- Laundry Soap
- Clothes Hangers
- Laundry Bag
- Iron (dorms)

Miscellaneous Items

- Emergency Information
- Digital Camera
- Umbrella

Personal Items

- Toiletries
- Air Freshener
- Medications
- Soap/Shampoo
- Medical Kit – Band-Aids etc.
- Toilet Paper