



"Dr. Eck did his homework before hosting. He went above and beyond to make sure the institute was a success."

-APT Lead Teacher

Host Manual

2026

"Sam goes above and beyond to make everyone feel like family."

-FSS Lead Teachers



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CASE Mission, Vision, and Core Value Statements

Mission

To design industry-leading, inquiry-based curriculum, and teacher education to create lifelong learners and prepare students for the future of agriculture.

Vision

To develop curriculum and professional development that empowers agriculture education teachers to inspire, educate, and prepare students for career success in the agricultural industry.

4 Core Values

Purposeful Curriculum

Creating a flexible, ready-to-execute curriculum model of sequenced agricultural education courses that enhance the delivery of agricultural education, uphold educational core standards, and help create work-life balance for teachers.

Fostering Connection and Growth

Building a network of agriculture educators across the nation to create unity and support and recognize achievements.

Student-Centered Learning

Fostering a student-centered agricultural educational experience that's focused on inquiry and project-based learning.

Teacher Training

Certifying teachers through industry-leading professional development so they can enhance the agricultural education experience for students.

Initiative of The Council

CASE 4 Learning is an initiative of The National Council for Agricultural Education (The Council).

The National Council for Agricultural Education serves School-based agricultural education. Since its beginning in December 1983, The Council has provided leadership for stakeholders in agriculture, food, fiber, and natural resources systems education.



Figure 1. The Council Logo

The Council identifies important opportunities and needed resources for agricultural education and drives action to support the development and direction focusing on academic and career success for all students. The Council fosters collaboration for agricultural education and represents National Team Ag Ed (organizations and entities representing students, teachers, teacher educators, state leaders, alumni, industry, state and national foundations, and government).

In 2005, The Council laid the foundation for program growth in agricultural education. The goal included *The Long-Range Goal for Agricultural Education*, more commonly known as *10 x 15*. This goal was to target 10,000 new agricultural education programs by 2015. Efforts to reach this measure included eight priority council initiatives. The third initiative, *Develop Multiple Agricultural Education Designs*, included CASE as the first design priority.

All coordinators and lead teachers are contractors of The Council. Hosts act as an extension of The Council's **Vision and Mission** (<https://thecouncil.ffa.org/about-us/>).

Minimum CASE PD Requirements

CASE PD events should provide a rigorous and meaningful experience for participants. Uniformity across sites is essential for the 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. Ensure the quality and uniformity of professional development by meeting minimum implementation requirements.

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

- CASE PD events must provide the required hours of instructional time prescribed by the specific course's scope and sequence.
- Hosts should have the required onsite materials and facilities for the CASE Institute or BriefCASE. Hosts use additional funding through registration fees to purchase the remaining consumables and equipment.
- ALL participants are to be present for the entire BriefCASE to attain certification. At CASE Institutes, participants may miss up to one day for unavoidable events as they arise. CASE PD Hosts must communicate and reinforce this rule in cooperation with the Lead Teachers.
- CASE-certified Lead Teachers facilitate instruction for CASE PD events. Lead Teachers have completed appropriate preparation at Lead Teacher Orientation.
- CASE PD emulates the classroom expectations of participants. The professional development facilities and instruction model CASE delivery methods. Host Site Coordinators provide the required equipment, facilities, and supplies recommended by CASE.
- Provide mentorship and guidance to Lead Teachers using the *CASE LT Coaching Guide*.
- CASE PD Host Site Coordinators, Lead Teachers, and CASE work cooperatively to ensure the operation of CASE PD events and support the growth of CASE participants.

Definitions

BriefCASE – Specialized professional development for shortened CASE courses or modules (9-18 weeks). BriefCASEs range from six hours to three days. BriefCASEs do not have participant check-offs for certification.

CASE State Leaders – Each state has three state leaders serving on the CASE Advisory Committee, providing feedback to CASE. These partners represent state staff, post-secondary education, and secondary education.

CASE Institute- Specialized professional development for full-year CASE courses. Institutes are five to nine days of professional development to address the element of instruction expected by teachers of a CASE course. CASE Institutes require participant check-offs for certification.

Check-Offs – A list of deliverables for participants to complete at a CASE Institute to obtain certification. BriefCASEs do not have check-offs.

Daily Plans – A document that Lead Teachers use to prepare and implement a BriefCASE or CASE Institute. The CASE team builds the foundational plan, including materials, timing, and notes for APP delivery. Lead Teachers are expected to build upon these plans, document notes, and share them with the CASE team two weeks before the event.

Event Finalization Form – A form completed by Lead Teachers at the conclusion of a BriefCASE or CASE Institute. Information captured includes recommendations for future events, LT nominations, and notice of any uncertified participants.

Host Site Coordinator – CASE professional development events are hosted by a third-party entity, typically a teacher education institution. Hosts can be post-secondary, high school, or teacher associations supported by

a teacher education institution. Because all logistics and financial responsibility is placed on the host site, a coordinator is named for each site. The Host Site Coordinator oversees all tasks related to the CASE Institute/BriefCASE.

Host Site Coordinator Timeline – A guide for host tasks for their events and what to do before, during, and after the event.

Hybrid – Hybrid events incorporate both in-person and virtual professional development. Some hybrid events have mandatory introductory or follow-up virtual meetings (AEMT, APT), while others (AFNR, ASA, ASP, FSS, NRE) do not.

Field Test – New CASE courses go through a field test phase the first year the course is ready for use in the classroom. A Field Test is the same experience as a regular CASE Institute and qualifies the participant for certification. However, additional expectations are placed on the participants regarding feedback of lessons and ongoing modifications to materials.

Lead Teacher (LTs) – Lead Teachers are CASE-certified teachers who facilitate a BriefCASE or CASE Institute. A Lead Teacher must be certified in the course and teach the curriculum as designed in their own program for at least one year. LTs annually attend a Lead Teacher Orientation for continued professional development.

Lead Teacher Orientation (LTO) – LTO is an annual professional development event aimed at the continual development of CASE Lead Teachers. Some time is allotted for Lead Teacher partners to plan their BriefCASE/CASE Institute. The LTO for CASE Institutes is a multi-day, in-person or virtual venue. Lead Teachers facilitating BriefCASEs attend a 30-minute virtual training.

Lead Teaching Timeline – A guide for LT tasks for their events and what to do before, during, and after the event.

Master Teacher – Master Teachers are experienced lead teachers with three or more years of lead teaching experience and two or more CASE certifications. Additional promotion and leadership experiences related to CASE are required. CASE Master Teachers are facilitators of professional development and ambassadors of CASE who serve as a resource for the promotion and implementation of CASE in their region.

Scope and Sequence – A framework or schedule that overviews the content of a BriefCASE or CASE Institute.

Virtual – Virtual PD events are facilitated via synchronous and asynchronous virtual delivery.

CASE Contacts

Scheduling CASE PD/General PD Questions or Issues

For general PD Questions, such as scheduling CASE, marketing your event, or solving PD issues, contact the following individuals.

- CASE Institutes – Michelle Goossen, CASE PD Coordinator, michelle.goossen@case4learning.org
- BriefCASEs – Tiffany Zwegardt, CASE Coordinator, tiffany.zwegardt@case4learning.org
- Pre-Service – Jen Russell, CASE Coordinator, jennifer.russell@case4learning.org
- Participant Issues – Carl Aakre, CASE Director, carl.aakre@case4learning.org
- Marketing – Chelsea Bowen, Events and Operations Coordinator, chelsea.bowen@case4learning.org

Course/PD Specific Questions

CASE is a curriculum initiative. Each member of our small team manages the CASE 4 Learning curriculum and answers PD questions. For course-specific questions, such as material questions, contact our subject matter experts.

- Carl Aakre, CASE Director, carl.aakre@case4learning.org
 - Ag Equipment Maintenance and Technology (AEMT)
 - Ag Research and Development (ARD)
- John Bergin, Curriculum Director, john.bergin@case4learning.org
 - Ag Power and Technology (APT)
 - Environmental Science Issues (ESI)
 - Food Science and Safety (FSS)
 - Natural Resources and Ecology (NRE)
 - Small Gas Engines (SGE)
- Tiffany Zwegardt, CASE Coordinator, tiffany.zwegardt@case4learning.org
 - Introduction to Ag, Food and Natural Resources (AFNR)
 - AgXplore Middle School (AgX)
 - Ag Business Foundations (ABF)
 - Animal Health and Veterinary Science (AHVS)
- Jen Russell, CASE Coordinator, jennifer.russell@case4learning.org
 - Agricultural Science – Animal (ASA)
 - Agricultural Science – Plant (ASP)
 - Investigating Agricultural Biotechnology (IAB)

BriefCASE vs. CASE Institute

BriefCASEs are shorter PD windows for trimester to semester-long courses. Table 1 categorizes the courses as BriefCASE or CASE Institute. Table 2 briefly details the difference between the two events. More information on Host Site Coordinator responsibilities follow throughout this manual.

Table 1. Delivery Method of CASE Courses

CASE Institutes		BriefCASEs
<ul style="list-style-type: none"> • Ag Equipment Maintenance and Technology (AEMT) • Introduction to Ag Food and Natural Resources (AFNR) • Ag Power and Technology (APT) • Animal Science (ASA) 	<ul style="list-style-type: none"> • Plant Science (ASP) • Environmental Science Issues (ESI) • Food Science and Safety (FSS) • Natural Resources and Ecology (NRE) 	<ul style="list-style-type: none"> • Ag Business Foundations (ABF) • AgXplore Middle School (AgX) • Animal Health and Vet. Science (AHVS) • Small Gas Engines (SGE)

Table 2. Differences Between CASE Institute or BriefCASE

Comparison	CASE Institutes	BriefCASEs
PD Length	5–8 days	6 hours – 2.5 days
Course Length	1 year	Trimester – Semester
PD Season	June – August	Year-round
PD Design	PD is designed as stand-alone events	PD is designed to be stand-alone or implemented with other events. Some hosts stack multiple BriefCASEs together. Others coincide with FFA events or Ag Teacher PD.

LT Training	LTs attend in-person/virtual LTO	LTs attend a shortened virtual LTO
Registration	Managed by CASE, Displayed on the CASE Website	Managed by the Host, Displayed on the CASE Website, Participants access MyCASE during the event
Marketing	Website information is managed by CASE, Host promotes within the region	CASE does limited marketing for nationwide events. Host promotes within the region. If a private event, host does all the marketing.
Finances – Registration Fee Invoicing	CASE charges/invoices participant	Host charges/invoices participant (Host collects all money)
Finances – Host Payments	CASE pays hosts from collected registration (75% in April, remaining after institute)	Since hosts are collecting registration amounts, no money is sent from CASE.
Finances – Invoices from CASE	CASE collects PD management fees and certification fees from payments.	CASE invoice Host Site Coordinator for the certification, management fees, including travel
LT Travel Expenses	Paid by CASE through travel vouchers, invoiced to host through PD management fee (locations with higher travel expenses for LTs may be invoiced additional travel fees).	Paid by CASE through travel vouchers, invoiced to host through PD management fee (locations with higher travel expenses for LTs may be invoiced additional travel fees).

MyCASE Dashboards

CASE uses dashboards in MyCASE. When logging into MyCASE, a series of dashboards appear for CASE Lead Teachers and Host Site Coordinators, as shown in Figure 2 and 3. Lead Teachers and Host Site Coordinators not receiving access to their appropriate dashboards should contact the *PD Coordinator*.

Lead Teacher General Dashboard

The *Lead Teacher General Dashboard* contains information pertinent to all Lead Teachers, including:

- Event Finalization Form
- Travel Vouchers
- Participant Contact Information
- Lead Teacher Contact List and Schedule
- Lead Teacher Orientation Information
- CASE Lead and Master Teacher Manual
- Daily Plan Submission Form
- Lead Teacher Nominations
- Teaching Strategies

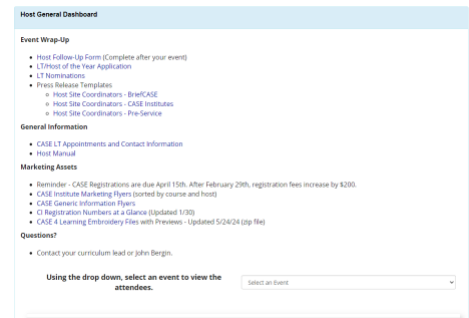


Figure 2. MyCASE Dashboards

Course Lead Teacher and Host Dashboard

A secondary dashboard contains PD-specific information specific to a CASE course. For example, ASA LTs and hosts only have access to ASA materials.

Lead Teachers

- Daily Plans
- Scope and Sequence
- Materials List by APP
- Example Participant Letter
- Check-Off Requirements (for CASE Institutes Only)

Hosts

- Print Binder and supplement printing documents
- Host Materials List and Budget

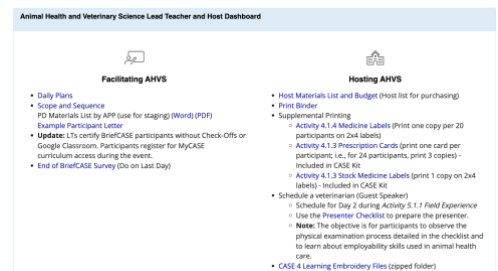


Figure 3. Course Lead Teacher and Host Dashboard

Host General Dashboard

All important host information will be linked in the *Host General Dashboard*. This area includes needed resources broken into the categories *Planning*, *Implementing*, and *Closing*. Reference the dashboard to find resources for hosting CASE PD events

- CASE Institute & BriefCASE Planning Checklists
- Host Manual
- CASE 4 Learning Embroidery Files (Updated Logo for Polo)
- CASE Branding Guidelines
- LT Appointments and Contact Information
- Participant Contact Information and Shirt Sizes
- Press Release Templates
- shopCASE Online Store
- Host Kit Rental
- CASE Institute Policies
- Marketing Flyers and Templates
- CASE Host ACH Form

Host Site Coordinator Application and Selection Process

Host Site Coordinators apply via the [CASE Institute Applications](#) and [BriefCASE Host Application](#). Considerations such as geographic locations, regional course demand, previous site evaluations, dates, and available facilities determine site locations for CASE PD events.

Minimum qualifications to host include:

- Ability to collect registration fees (BriefCASEs)
- Provide equipment and supplies outlined in the *Host Budgets* and have access to necessary onsite equipment.
- Facilities appropriate for the CASE event
- Location feasible for teacher travel, lodging, and availability of meal options
- Time to plan and availability during the PD event
- Communication with CASE and Lead Teachers
- College credit (CASE Institutes) – Non-postsecondary hosts can partner with a local university to offer graduate credit. Graduate credit is optional for participants and meets the fees assigned by the local university.

BriefCASE Selection Timeline

BriefCASE events are selected on a seasonal basis. Table 3 lists the application deadline for BriefCASE events. Small Gas Engines (SGE) require additional time due to the materials necessary for PD events.

- Summer events: For big picture logistics, it is best to apply for summer BriefCASEs during the institute application season (September 2nd–26th).

Table 3. BriefCASE Application Timeline

Events	Event Timeframe	BriefCASE Host Application Deadline	Registration Closes (Recommended)
Ag Business Foundations (ABF)	6 hours	3 months in advance	1 month in advance
AgXplore Middle School (AgX)	1.5 days	3 months in advance	1 month in advance
Animal Health and Vet. Science (AVHS)	1.5 days	3 months in advance	1 month in advance
Small Gas Engines (SGE)	2.5 days	6 months in advance	1 month in advance

CASE Institute Selection Timeline

CASE Institutes are selected on an annual basis. Table 4 describes the timeline for CASE Institute selection, registration, and LT assignments.

Table 4. CASE Institute Timeline

Process	Event Timeframe	Host Site Coordinator Roles
Apply to host a CASE Institute	Due September 26, 2025	Complete the CASE Institute Host Application
CASE selects Host Site Coordinators	October	Provide hotel recommendations or dorm package details
Announcement of CASE Institutes and Host Site Coordinators	Internally – October Externally (Public) – NFFA Conv.	
Scholarship Application Period	Announced at NFFA Conv. Due December 1st	Host Site Coordinators help promote CASE Institute Scholarships
Registration (Early Bird)	January 5 th – February 28 th	Host Site Coordinators regionally promote their event
Registration (Standard)	March 1 st – April 30 th (June Events) March 1st – May 15th (July/Aug. Events)	
Lead Teacher Orientation (LTO)	March 24-25, 2025 Virtual	Meet virtually with Lead Teachers
Host Payments	75% in April for running events 25% after the event	

Host Site Coordinator Timeline

Refer to the *Host Checklist* in *Appendix B* or MyCASE dashboard for a complete timeline of duties as a host site coordinator.

Event Logistics

Lodging

The expectations for lodging have shifted to the participants to help keep accounting simplified for hosts and CASE and to reduce liability to The Council. This opens flexibility for teachers and school accounting systems.

Lead Teacher/Participant Lodging

Registration fees do not include lodging expenses. Participants will make room for their own reservations at a CASE Institute or BriefCASE. Hosts can offer an add-on package with rooming accommodations. The participant will purchase these packages from the host and not from CASE. CASE books lodging for Lead Teachers through the host option.

- **Option 1 – CASE reserves a block of hotel rooms** for participants to make their own room reservations. CASE Institutes hosts recommend their top three local accommodations after the host selection process is complete. BriefCASE hosts give one hotel recommendation on their host application. The hotel should offer a free breakfast. Host responsibilities include:
 - Provide CASE staff with top three local hotel accommodations for potential housing blocks.
 - The block will be open from the day before to the day after the event.
 - Blocks will have cut-off dates
 - CASE books all CASE Institute room and flight reservations for the Lead Teachers.
- **Option 2 – Host site coordinators arrange a dorm package** for participants to reserve with the host. This may be an optimal choice for hosts that use dormitories.
 - Hosts develop and manage their own dorm package.
 - Cost, package, and purchase information will be on the CASE Institute registration page.
 - Participants purchase the package with the host.
 - CASE books all CASE Institute room and flight reservations for the Lead Teachers.

Lead Teachers are to have separate rooms unless accommodation is made with local Lead Teachers for BriefCASE events. Lead Teachers who wish to come early or stay later are the responsibility of the Lead Teacher. For CASE Institutes, LTs arrive on Saturday for events starting on Monday. For BriefCASEs, LTs arrive a day in advance.

Meals/Snacks

BriefCASE Meals

- BriefCASE Host Site Coordinators should provide lunches for participants and applicable evening meals for Lead Teachers.
 - *Ag Business Foundations (ABF)* – One lunch (Day 1)
 - *Animal Health and Veterinary Science (AVHS)* – Two lunches (Days 1 and 2)
 - *AgXplore Middle School (AgX)* – One lunch (Day 2 on standard schedule)
 - *Small Gas Engines (SGE)* – Two lunches (Days 1 and 2)
- Catering is an excellent option for lunches. Suggested budget is \$15/person.
- Review participant allergens via the *Host Dashboard* when selecting meals. Please contact them before the event to determine the best way to accommodate their dietary needs.
- **Allergens** – Collect allergen information from participants and Lead Teachers prior to the event. BriefCASE Hosts should collect this information on their registration form. Contact participants and lead teachers before the event to determine the best way to accommodate their dietary needs.

CASE Institute Meals

- Provide one evening meal for participants and Lead Teachers. Suggested budget is \$25/person.
- CASE Institute Host Site Coordinators should provide lunches for participants and applicable evening meals for Lead Teachers.
 - *Ag Equipment Maintenance and Technology (AEMT)* – Five lunches (Days 1–5)
 - *Ag Power and Technology (APT)* – Five lunches (Days 3–7)
 - All other events – Four lunches (Days 1–4)



Kansas State University partnered with a local equipment manufacturer to sponsor an evening meal. This connected participants together for an evening while providing industry connections.

Figure 4. Sponsored Meal

- Catering is an excellent option for lunches. Suggested budget is \$15/person.
- **Allergens** – Review participant allergens via the *Host Dashboard* when selecting meals. Contact participants and lead teachers before the event to determine the best way to accommodate their dietary needs.

Snacks

- Provide snacks and drinks to participants and Lead Teachers throughout your event. Refreshments help keep participants' energy up during instruction. Budget \$15/participant.
- Participants take daily breaks at 10 AM and 3 PM. Snacks, such as cookies, fruit, chips, water, or soda, are great motivators for teachers who push themselves hard throughout the day.
- Some hosts select methods to show off their campus with snacks - campus ice cream, bakery science department cookies, etc.



Washington State University provides a cheese snack to participants from their school dairy bar. This builds community while showcasing features of their land-grant institution.

Figure 5. Washington State Cougar Cheese

Travel

Lead Teacher Travel

- CASE arranges airfare for LTs to and from the host site.
- CASE makes an effort to schedule at least one (if not both) Lead Teacher within driving distance of the host site. However, this is not always easily accomplished, especially with new courses, specialized courses, or areas underrepresented by CASE Lead Teachers. When necessary, Host Site Coordinators arrange transportation between:
 - The airport and host site
 - Hotel and classroom daily

Participant Travel

- Host Site Coordinators are not responsible for participant travel but can provide suggestions for local transportation or flights.
- Hosts are encouraged to provide options to participants from a local airport.
- Hosts are encouraged to provide transportation to participants, if needed, from the official housing block.



Montana State University provided participants with an Uber voucher for local transportation. Participants were encouraged to carpool and to tip reasonably. The remaining funds were returned to the university.

Figure 6. Montana State Uber Vouchers

College Credit Considerations

- CASE provides electronic certificates via MyCASE to all certified participants.
- Host Site Coordinators are encouraged to provide graduate-level credits for CASE Institutes. Participants are responsible for making arrangements for graduate credits.
- Host Site Coordinators should communicate the enrollment process and credit cost to participants.
- CASE communicates college credit options for CASE PD events on the CASE website. Email the Events and Operations Coordinator if your credit is not displayed.

CASE Polos

BriefCASEs

SWAG is optional for BriefCASEs and not included in the Host Budget.

CASE Institutes

CASE Polos are a traditional staple for CASE Institutes. Hosts must provide a CASE 4 Learning branded polo (using the new brand) for their participants. Per trademarked guidelines, the logo must be unaltered with no additional shapes or logos added within it. The polo is the standard.

While hosts and Lead Teachers may have many CASE polos, most of our participants do not. Hosts may select to use their colors and logos in addition to the CASE 4 Learning logo.



Figure 7. Pistol Pete CASE Polos

Oklahoma State University provides CASE polos with Pistol Pete on the sleeve to their participants.

Developing Community

Hosts are encouraged to provide optional events for participants to build community. Examples include:

- Providing suggestions for local dining or entertainment venues
- Providing a tour of the campus
- Participating with LTs in the CASE “graduation ceremony” on the last day of the CASE Institute
- Inviting a department head to speak during a CASE Institute lunch
- Handing out promotional freebies, such as pens or pencils, at registration
- Does your department have a grill? Elect to grill some food instead of catering in lunch one day.



Host Site Coordinators at Arkansas Tech walk into the closing remarks at their CASE Institute in full graduation regalia.

Figure 8. Arkansas Tech Graduation

Event Facility Requirements

Host Site Coordinators select facilities for the PD event. Facilities should accommodate adult learners in the appropriate lab setting for the specific PD event. Table 5 summarizes general facility requirements, and Table 6 details facility requirements specific to each PD event. Table 7 outlines when the Lead Teachers need access to facilities.

Table 5. General Facility Requirements

Area	Requirements or Considerations
Classroom Facility	<ul style="list-style-type: none"> • Projector with screen • Whiteboard or chalkboard with appropriate utensils available for Lead Teacher use • Area of lead teacher material staging (can be a separate room) with tables • Water source (all courses but ABF – can be modified for AgXplore) • Appropriate heating and/or air conditioning
Seating	<ul style="list-style-type: none"> • Tables with chairs appropriate for adults of all sizes • Ability to group tables together for groups
Participant computer needs	<ul style="list-style-type: none"> • Wi-Fi internet access for participants and lead teachers • Power supply for participant laptops (floor power supply, power strips, extension cords, etc.)
Lunch/snack area	<ul style="list-style-type: none"> • To promote lab/food safety - use a separate area for lunch/snacks than the classroom facility • Not applicable to ABF

Table 6. General Facility Requirements

Course(s)	Requirements or Considerations
AFNR, ASA, ASP, NRE, ESI, AHVS	<ul style="list-style-type: none"> • Lab space with appropriate size countertops to use as a workspace for various laboratory experiences
AFNR, ASP, NRE, ESI	<ul style="list-style-type: none"> • Land labs (see specific course material lists)
FSS	<ul style="list-style-type: none"> • Kitchen space, in addition to the classroom space, is required for FSS • At a minimum, there should be a kitchen station for each group of 4 participants. Each kitchen station should include an oven, stovetop, and counter space for food preparation. • Refrigerators – preferably two
APT	<ul style="list-style-type: none"> • Close access to a shop facility with a drill press, compound miter saw, chop saw, and workbenches with vises
SGE	<ul style="list-style-type: none"> • Shop space appropriate for engine work with an outside door for ventilation (preferably a garage door) • Compressed air source • Tables for engine teardown, assembly, starting • Guest speaker availability (see specific course material lists)
AEMT	<ul style="list-style-type: none"> • Shop space appropriate for shop work with garage doors for bringing in equipment • Compressed air source • Multiple tractors and equipment for inspection and diagnostics – participants operate equipment available (see specific course material lists) • Industry field trip options – tractor dealership (see specific course material lists) • Workbenches with vises

Table 7. Facility Access Requirements

Course(s)	Access Requirements
ABF	<ul style="list-style-type: none"> • 1-hour prior to the event
SGE	<ul style="list-style-type: none"> • 1-day prior to the event • 7 AM – 6 PM duration of the event (Day 2 may extend into the evening if participants have trouble starting engines)
AgX, AHVS	<ul style="list-style-type: none"> • Day before if starting in the morning • Day of if starting after lunch • 7 AM – 6 PM duration of the event
All CASE Institutes	<ul style="list-style-type: none"> • Day prior (usually Sunday – all day) • 7 AM – 6 PM duration of the event

Host Site Coordinator Finances

PD Management Fee

The base calculation for PD Management includes the stipends for two LTs, travel expenses, lodging, and their meal stipend. The meal stipend does not include meals provided (lunches and one evening meal). PD Management Fees are summarized in Table 8. CASE books the lodging and transportation expenses for the lead teachers.

There are three types of BriefCASE events. Hosts indicate their event type on their application.

- Public - Open Registration (Full CASE Management Fee)
- Private/Restricted Event - Participants are restricted to a school district/state/area and CASE Manages Lead Teacher contracts and payments (Full CASE Management Fee)
- Independently Funded - Host contracts CASE-approved Lead Teachers, and pays for Lead Teacher contracts, lodging, and travel (No CASE Management Fee)

Table 8. PD Management Fee Summary

Course	Event Format	PD Management Fee
ABF	6 Hours	\$2,270
AgX, AHVS	1.5 Days	\$3,540
SGE	2.5 Days	\$4,670
IAB	TBD	TBD
ASA, ASP, AFNR, NRE, FSS	5 Days	\$7,820
APT	5 Days In-Person, 2 Days Virtual	\$9,420
AEMT	5 Days In-Person, 3 Days Virtual	\$10,220

Participant Certification Fee

The certification fee for CASE institutes is a one-time payment that provides life-long access to the curriculum. The curriculum follows the teacher. The certification fee is built into a registration fee.

BriefCASE Certification Fee

- The certification fee for all BriefCASEs is \$400
- The Pre-Service rate for all BriefCASEs is \$200 (with no extra payment)

CASE Institute Certification Fee

- The certification fee for all CASE Institutes is \$1,300 (reduced to \$1,100 for early bird registrations)
- The Pre-Service rate for CASE Institutes is \$500 (with no extra payment)

BriefCASE Registration and Invoicing

- Participants register for BriefCASE events through the host
- The **Host Site Coordinator invoices the school/participant**
- CASE invoices the Host Site Coordinator at the conclusion of the event, as follows:
total invoice = PD management fee + (# of participants x certification fee) + extra travel if necessary + host kit rental fees if necessary

BriefCASE Cancellation Policy

- Hosts create and maintain their own cancellation policies and fees for BriefCASEs

CASE Institute Registration and Invoicing

Hosting Services and Facilities

A host's time and facilities are expenses. Table 9 outlines suggested host expenses. These suggestions are consistent with our rate with payment to lead teachers. All CASE Institute prices and suggested BriefCASE prices consider this in the margin. This is listed as the host net in the Host Budget.

Table 9. Hosting Services and Facilities

Item	Budget/Day	Days	Estimate
Host Expenses	\$400	5 days	\$2,000
Facility Expenses	\$200	5 days	\$1,000

Consistent Pricing

Registration fees are consistent across the board for 2026 CASE Institutes. Table 10 includes the registration fee for each CASE Institute. Refer to the CASE Institute budgets for your course for the breakdown for each course.

Table 10. CASE Institute Registration Fee

Course	Early-Bird Registration Fee Before March 1st	Standard Registration Fee Starting March 1st
AFNR, ASA, ASP, FSS, NRE	\$2,250	\$2,450
APT	\$2,450	\$2,650
AEMT	\$2,750	\$2,950

Host Kits

Starting in 2025, CASE allows hosts to rent kits for select courses (AHVS, FSS, AFNR, ASA, APT, ASP, AEMT, NRE/ESI). Hosts may opt to rent a kit of specialized equipment and are responsible for shipping it one way after their event. Shipping should include the minimum insurance indicated in the course-specific *Host Budget*. CASE covers the first round of shipments. Hosts with local supplies available can opt out of the rental option. Refer to the host budget for your course for the breakdown for each course.

Invoicing

- Participants register for CASE Institutes events through MyCASE
- Participants register for any housing packages through the host and pay the host
- Registration closes on April 30th for June events and May 15th for July and August events
- Teachers paying prior to February 28th receive a \$200 discount on their early bird rate (this is the set fee in Table 10. The extra \$200 is reserved by CASE for special assistance for at-risk CASE Institutes, etc.
- **CASE invoices the school/participant** for CASE Institute registrations
- **CASE pays the Host Site Coordinator** in two installments, collecting the PD management fee and certification fee

CASE Institute Cancellation Policy

- Participants will be reimbursed the full cost minus a \$500 administrative fee if they cancel before April 15th.
 - A 5-day grace period after registration is allowed to cancel or change CASE Institute registrations with no penalty.
- After April 15th, no refunds will be remitted unless it is an extenuating circumstance.
- Additional refunds or deferments will only be considered for extenuating circumstances that the executive committee must review and approve.

BriefCASE Institute Cancellation Policy

Since BriefCASE hosts are financial managers for their event, they decide their own cancellation and refund process.

Participant Expectations

All CASE participants digitally sign a **CASE PD Participant Expectations Agreement** during registration. Host Site Coordinators should assist participants when they fall short of the agreement, including communications with CASE team members.

Site Cancellation

From time to time, PD events may need to be canceled due to low participation. To cancel a PD event, refer to the guidelines below. CASE will communicate with hosts that appear to be at risk.

- Hosts must provide notice of CASE Institute cancellation to CASE staff before March 1st.
- BriefCASE cancellation must be communicated to the CASE staff three weeks before the session start date.
- BriefCASE Hosts are responsible for communicating cancellations and refunds with participants.
- CASE cancels the PD event of concern and contacts registered participants to transfer registration to another host site.
- Cancelled host sites are not due any funds or invoiced for their event.

Coaching Lead Teachers

Host Site Coordinators play a vital role in ensuring the quality of The Council's initiative. Lead Teachers are selected and trained by CASE prior to arriving at a CASE PD event. Hosts of CASE Institutes should serve as mentors to Lead Teachers when available. Ideally, this would happen on the first day of a CASE Institute.

The *CASE LT Coaching Guide* is a great tool for coaching LTs. This guide is linked in the *Host General Dashboard* in MyCASE. Suggestions for implementation of the coaching guide include:

- Ask your Lead Teachers for an APP to evaluate on Days 1 and 2.
- Ask your lead teachers to provide you with their LT notebook – they have copies of the coaching guide on the back of their book.
- Evaluate Lead Teachers and select a time to provide constructive and positive feedback.
- Repeat this process on Day 2 of your Institute – marking the growth of a Lead Teacher.
- If a Lead Teacher is not performing well, please contact CASE immediately.

Appendix A – CASE LT Coaching Guide

Facilitating Inquiry-Based Learning

Areas with Room for Improvement	Criteria	Areas that Meet or Exceed Expectations
	<p>Teacher Role The LT models what it looks like to be genuinely curious and presents themselves as learning alongside their participants. They model the critical thinking skills of a scientist, technician, engineer, or agribusiness employee.</p>	
	<p>Questioning The LT poses open-ended questions to help participants connect curriculum concepts to prior learning.</p>	
	<p>Response to Inquiry The LT is flexible and attentive to participants' changing needs and interests.</p>	
	<p>Participant Engagement Participants are engaged and actively curious. Engagement may spark additional questions for future lessons or discovery.</p>	

Teaching Adults

Areas with Room for Improvement	Criteria	Areas that Meet or Exceed Expectations
	<p>Andragogy Adult learners are respected and treated like adults. The LT engages self-directed learners in an environment of mutual respect and collaboration. The LT incorporates technical skill development as the foundation of their APP instruction.</p>	

CASE Ambassador

Areas with Room for Improvement	Criteria	Areas that Meet or Exceed Expectations
	<p>Staying True to the CASE Model The LT teaches the APPs as designed, understanding they are the main delivery model of the curriculum product. The LT also:</p> <ul style="list-style-type: none"> • Models <i>Areas of Emphasis</i> • Showcases the curricular spiraling and scaffolding of course concepts • Highlights scaffolding through APP modalities 	
	<p>Professionalism The LT dresses appropriately for their role as a facilitator and based upon the course activities. Acceptable attire ranges from business to casual attire. CASE branding should be worn when available. Professional language and behavior are expected at all times.</p>	
	<p>Communication The LT communicates early and often with the CASE Host Site Coordinator, CASE, and participants. Guidelines for communications are documented in the <i>LT Planning Timeline</i>.</p>	
	<p>Organization The LT prepares before the event in accordance with the <i>LT Planning Timeline</i>. During the event, the LT prepares materials in advance and tests samples/equipment prior to the APP.</p>	
	<p>Safety The LT models personal safety through material handling, equipment use, and wearing PPE. CASE Institutes and BriefCASEs should model a culture of safety.</p>	

Resources

Harvard Graduate School of Education. *Inquiry-driven teaching and learning: A general rubric*. Project Zero. <http://www.pz.harvard.edu/sites/default/files/Inquiry%20Rubric%20EN%20-%20Jul2020%20FINAL.pdf>

Appendix B – CASE Institute Planning Checklist

Hosts should use the following checklist and timeline as a guideline. Each site will have its own specific needs.

Timeline	Task	Notes
Fall		
September 2nd – September 26th	Set dates for the PD event	
	Determine the course to be offered	
	Inventory local supplies and calculate breakeven	
	Submit Host Application	
October – November	Provide details for lodging options. Finalize methods for booking requests. If using the dorm option, provide CASE a PO and a website for ordering.	
	Review the website for your event, created by CASE	
	Review billing information	
	Request marketing materials	
	Reserve classrooms, laboratories, and meeting space. Resolve security and storage issues.	
Marketing – Market your event locally. Work with local stakeholders to review scholarship deadlines in your community. Assist in promoting CASE scholarships to your region.		
Early Spring		
	Meet with the CASE Coordinator assigned to your CASE Institute.	
	Arrange audio-visual and internet support for classrooms	
	Reserve space for the evening meal	
	Arrange food service or a system for lunches (and meal options if included in your package).	
April		
April 1st	Order according to needs using the Host Budgets on the Host Dashboard. (Do NOT use course purchase manuals for PD events)	
	OPTIONAL – Order/collect giveaways for participants (i.e., lanyards, cups, etc.)	
May		
By May 1	Prepare and send information packets by mail or email to participants. Add specific logistical information to your event website, including orientation and start dates. <ul style="list-style-type: none"> Greetings and host introduction – whom 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 Transportation to and from host site Housing checklist 	
	Lead Teacher Communication – communicate for airport pickup, facilities, material questions, planning virtual orientation meetings, etc	

May 1st – May 15th	Verify the final attendee list through MyCASE	
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Timeline	Task	Notes
One Month Prior		
	Arrange local IT support for any equipment needs; schedule help for the opening evening session.	
	Purchase/order needed classroom/office supplies.	
	Arrange for parking passes and maps	
	Communicate necessary housing information to participants. Include rooming list	
	Order CASE polos with new CASE 4 Learning branding	
	APT – Ship virtual kit.	
	Order print binders for each participant. Spiral bound the notebook.	
	Send housing list to dorm – if using dorm option	
One-Two Weeks Prior		
	Purchase local non-perishable supplies	
	Check vendor shipments for completeness	
	Print any special printing for activities	
	Prepare/print registration check-in list for participants	
	Secure classroom/laboratory keys for Lead Teachers	
	Confirm meals	
	Confirm housing: housing list, registration, security cards - if using dorm option	
	Confirm guest Wi-Fi access and classroom projector setup	
	Compile equipment and supplies by type for Lead Teacher prep	
	Co-conduct virtual orientation meeting with Lead Teachers	
	Prepare Participant take home supply kits (AEMT, FSS)	
Weekend Before		
	Provide transportation for Lead Teachers from the airport to lodging and classroom as needed	
	Work with Lead Teachers to prepare classroom facilities and arrange supplies	
	Discuss with the Lead Teachers the schedule for purchasing perishable supplies	
	Provide Lead Teachers with keys for building and classroom access	
	Inventory Host Kit (if applicable)	
Day One		
	Set up registration and prepare to check-in participants	
	Check-in participants	
During		
	Confer with Lead Teachers about perishable items and dates needed	
	Keep classroom snacks and drinks replenished as needed.	
	OPTIONAL – Provide class field trip information; confirm participants attending and transportation	
	Organize polos to be given out	
	Coach Lead Teachers using the <i>CASE LT Coaching Guide</i>	
	Meet with Lead Teachers regarding cleanup and organization of PD equipment and supplies; develop a list of any consumables used up that need replenishing.	
	Take a group picture with PD event polos.	

End of Last Day		
	Collect any borrowed materials that need to be returned	
	Collect all class keys from Lead Teachers	
	Have Lead Teachers help move equipment and supplies to designated storage	
	Repack the CASE Kit Rental if used and prepare for shipping	
Within One Month After		
	Pay bills, file and record invoices; finalize host account statement	
	Submit Host Follow-Up Form in MyCASE Dashboard	

Appendix C – BriefCASE Planning Checklist

BriefCASE Hosts should use the following checklist and timeline as a guideline. Each site will have its own specific needs. Automated emails will be sent through SmartSheet as Check-Ins and Reminders.

Timeline	Task	Notes
Prior to Applying		
	Set dates for the PD event	
	Determine the course to be offered	
	Inventory local supplies and calculate breakeven	
	Submit Host Application including, lodging option, breakeven number, host W9.	
After Application Approval		
	Meet with the course curriculum coordinator or BriefCASE manager to verify application and confirm dashboard and curriculum access.	
	Create registration form and share link with BriefCASE manager.	
	Review the website for your event, created by CASE	
	Reserve classrooms, laboratories, and meeting space. Resolve security and storage issues.	
	Market your event locally. Work with local stakeholders to review scholarship deadlines in your community.	
	Arrange food service or a system for lunches	
Six-Three Months Prior		
	Order according to needs using the Host Budgets on the Host Dashboard. (Do NOT use course purchase manuals for PD events)	
	OPTIONAL – Order/collect giveaways for participants (i.e., lanyards, cups, etc.)	
	Lead Teacher Communication – communicate for airport pickup, facilities, material questions, planning virtual orientation meetings, etc	
	Monitor registration and market event.	
One Month Prior		
	Confirm you have reached your required breakeven number with the BriefCASE Manager. Proceed with hosting or canceling the event based on results.	
	Send CASE provided Curriculum registration link and directions to registred participants.	
	Arrange local IT support for any equipment needs.	
	Purchase/order needed classroom/office supplies.	
	Arrange for parking passes and maps.	
	Order spiral bound print binders for each participant.	

Timeline	Task	Notes
One-Two Weeks Prior		
	Purchase local non-perishable supplies	
	Check vendor shipments for completeness	
	Print any special printing for activities	
	Prepare/print registration check-in list for participants	
	Secure classroom/laboratory keys for Lead Teachers	
	Confirm lunch order(s) with vendors	
	Confirm housing: housing list, registration, security cards - if using dorm option	
	Confirm guest Wi-Fi access and classroom projector setup	
	Compile equipment and supplies by type for Lead Teacher prep	
	Confirm Host registration matches CASE Host Dashboard Registration. Resend CASE provided Curriculum registration link and directions to registred participants as needed.	
Day Before		
	Provide transportation for Lead Teachers from the airport to lodging and classroom as needed	
	Work with Lead Teachers to prepare classroom facilities and arrange supplies. Inventory CASE Rental Kit if using.	
	Discuss with the Lead Teachers the schedule for purchasing perishable supplies	
	Provide Lead Teachers with keys for building and classroom access	
Day One		
	Set up registration and prepare to check-in participants	
	Check-in participants	
End of Last Day		
	Collect any borrowed materials that need to be returned	
	Collect all class keys from Lead Teachers	
	Repack the CASE Kit Rental if used and prepare for shipping	
	Have Lead Teachers help move equipment and supplies to designated storage	
Within One Week After		
	Submit <i>Host Follow-Up Form</i> on <i>Host Dashboard</i> to verify participant numbers for invoicing	

Appendix D – Pre-Service Addendum

Since introducing CASE professional development in 2009, teacher certifications have grown exponentially. Growth in teacher certification indicates that CASE is an outstanding investment in teacher professional development. This growth has demonstrated the need for Pre-service teachers who can enter the field with at least one CASE certification. Not only do beginning teachers who are CASE certified have a head start in curriculum and instructional design, but they are also eligible and competitive in agricultural education programs where the CASE curriculum has been previously implemented. The CASE Pre-service Certification Program has been developed to meet that need.

Agricultural education programs nationwide struggle to provide enough highly qualified graduates to replace the many openings in their states each year. Professional development from a CASE Pre-Service programming supplements the quality of agriculture teacher preparation for student teachers and recent graduates applying for teaching positions. CASE certifications offered in a pre-service setting can increase agricultural education graduates' confidence and preparedness to teach. CASE provides structure and guidance as a foundational tool for certified beginning teachers.

CASE Affiliate Institution Role and Responsibilities

Affiliate Institutions hosting a CASE Pre-Service Institute can choose to have an Affiliate Faculty member, or CASE Lead Teachers facilitate the program. Affiliate Faculty are expected to participate in the CASE Pre-service Program and facilitate professional development for pre-service teachers by meeting the requirements outlined in this document and the CASR Host Manual. CASE expects a CASE Affiliate Institution to provide facilities and equipment that model the ideal teaching environment for CASE professional development.

Affiliate Faculty

Affiliate Faculty may serve as Lead Teachers providing pre-service professional development. To become an affiliate faculty member, post-secondary faculty must attend a CASE Institute as a participant to be certified. Post-secondary faculty can apply to be Affiliate Faculty members by completing an [Affiliate Faculty Application](#). Once the application is approved, the faculty member can attend a CASE Institute with a waived certification fee. Faculty must register for and attend the CASE Institute for the course they intend to facilitate in their pre-service program. Only the certification fee is waived if an Affiliate Faculty member travels offsite to participate in a CASE professional development event.

Pre-Service Models

Affiliate Institutions can choose one of two models for their pre-service program. The Institute model is similar to the CASE Institutes in-service teachers attend. An Integrated CASE model incorporates the professional development into as a course offered by the affiliate institution.

Integrated Model

The integrated model of certification looks much like a college course. The course may have a course title and number, provide undergraduate credit hours, and be part of the pre-service teacher's schedule during the semester, or it may be offered as a special problems course. The university must allow restructuring of the Agricultural Education program to make room in the credit requirements for CASE to be offered and taught.

The material in the scope and sequence of a CASE Institute is still expected to be taught, but the schedule is based on the university class schedule for the semester. Affiliates are encouraged to modify and expand

the scope and sequence to include material not included in the scope and sequence to meet pre-service needs. This model can be facilitated by a single Affiliate faculty member. Affiliate Faculty who are already a part of the Agricultural Education department typically teach integrated CASE courses; thus, no additional Lead Teachers are needed.

Institute Model

The institute model of pre-service certification is the same as that of an institute for in-service teachers. The scope and sequence are the same and follow the daily plan that summer institutes follow. Participants may come from within the hosting school only, or the school may opt to open their institute to other agricultural education preparatory programs.

The institute model follows the same professional development model that in-service teachers participate in. Benefits include convenience, familiarity, and lack of need for program restructuring. Participants can be certified in a matter of days rather than over an entire semester. Since Lead Teachers are familiar with this model, CASE can identify Lead Teachers for the institute. Affiliate Faculty can choose to lead teach as well. Two Lead Teachers Pre-service programming held too early in spring or summer may also limit CASE Lead Teacher availability.

Minimum Requirements

CASE Pre-Service events should deliver a rigorous and meaningful experience for participants. Consistency across sites is crucial for the validity of data from program evaluations and student assessments. CASE requires that every participant has an equally challenging experience to improve classroom opportunities for agricultural education students. The quality and uniformity of professional development should be ensured by adhering to minimum implementation requirements.

Minimum requirements for CASE certification as a part of a pre-service program include the following:

- As a minimum, provide the required hours of instructional time prescribed by the specific course's scope and sequence. This can be met in an integrated or institute model. Additional hours of instruction are encouraged.
- The professional development facilities, equipment, and supplies meet the needs to model CASE delivery methods.
- CASE Affiliates work cooperatively with CASE following the suggested timeline to ensure a successful program.

Affiliate institutions have the professional discretion to provide training to pre-service students in a manner that professionally reflects the institution's expectations and standards. Professional development documents from the prior year (e.g., Daily Plans for the 2024 summer will be available for the 2024-25 school year). will be provided to affiliate instructors upon request. Document requests should be sent to the CASE Pre-Service Coordinator.

Implementation

Application

CASE Affiliates apply via the [CASE Pre-Service Application](#). Applications for the event should be submitted 60 days before the start of the event. The suggested window for the Fall semester is May 15 to July 15, and the suggested window for the Spring semester is October 15 to December 15.

Planning

The Affiliate Institution should refer to the [CASE Host Manual](#) for planning purposes. Before the event is approved, the CASE Pre-Service Coordinator will discuss the following key topics with the Affiliate Institution.

- Type of Pre-Service Program (Integrated or Institute)
- Facilitators (Lead Teachers) Needed
- Certification and Management Fees
- Program Dates
- Required Materials
- Reference Documents for Planning (Scope and Sequence, Materials Lists, PD Binder)
- Student Registration Process
- Payment Process

Registration

Students must create a MyCASE account and register for the event through an online registration process. Once they have created an account, CASE will work with the Affiliate Institution to follow the registration process below.

1. CASE will set up an event registration link and share it with the Affiliate Institution.
2. The Affiliate Institution shares the link with each pre-service student to register for the event.
 - Once registered, the pre-service student will have access to the curriculum.
3. The pre-service student will receive a confirmation email that they have registered.
4. The Affiliate institution will notify CASE if any student drops from the course or does not complete the certification requirements.
 - CASE will cancel the students' registration and remove their curricular access.

Pre-Service Payment

The Affiliate Institution will notify CASE when the CASE Pre-Service Institute is complete. The notification should include a list of all students who have completed and not completed the Institute. Once the number of certified students is confirmed, CASE will send the Affiliate Institution an invoice for Management and Certification Fees.

Management Fee

- The Integrated Model will not have a Management Fee because no Lead Teachers are contracted with CASE
- The Institute Model may have a management fee assessed to CASE Affiliates for each Lead Teacher contracted with CASE. The management fee for each type of CASE Institute can be found in the CASE Host Manual. ***The management fee should be discussed and agreed upon before the event is approved.***

Certification Fee

- A \$200 fee will be assessed for all pre-service students certified in a course offered as a BriefCASE.
- A \$500 fee will be assessed for all pre-service students certified in a course offered as a CASE Institute.

Appendix E – Absentee Agreement

*Updated 3/20/2024

Expectation

The following is an excerpt from the *CASE PD Participant Expectations Agreement*. Starting in 2024, all participants sign this agreement digitally upon registering on the CASE 4 Learning website. LTs review this agreement at the beginning of CASE Institutes and BriefCASEs.

CASE PD Expectations

I understand and agree to follow the participant expectations and professional behavior guidelines. I understand that failure to abide by the participant expectations or professional behavior guidelines may lead to appropriate sanctions up to removal from the CASE PD event. I understand that I forfeit the entire registration fee, will not be certified, must return the curriculum and materials, and am responsible for my lodging and transportation required to return home should I be removed from the CASE PD event due to not meeting participant expectations or professional behavior guidelines.

Participant Expectations

1. Arrive on time and actively participate in the duration of the CASE PD event.
2. Interact and communicate positively and safely with all parties.
3. Remain committed to the learning experience as outlined in the CASE PD event.
4. Maintain professional, legal, and ethical conduct at all times. Avoid inappropriate behavior or sexual harassment with participants, Lead Teachers, hosts, or guests.
5. Complete all deliverables specific to the course *Scope and Sequence*.

CASE Institute Absentee Policy

The *CASE Institute Absentee Policy* is a commonsense approach.

- **Length** – Participants may miss up to one PD day of a CASE Institute, but must make up check-offs missed during the PD. Due to the brevity of BriefCASEs, there is no absentee policy for BriefCASEs. The length of the PD day varies across platforms. Virtual days are six hours; full in-person days are eight hours.
- **Participant Responsibility** – Participants are responsible for their own PD. This responsibility includes making up all check-offs before the end of the CASE Institute. Participants not completing this or missing more than eight hours forfeit their certification, registration fee, and curriculum access. CASE will notify the fiscal party paying for the CASE Institute registration.
- **Lead Teacher Responsibility** – Lead Teachers should encourage participants not to miss. However, situations arise. In these situations, LTs explain to the participants the required check-off items they will miss. LTs communicate to the CASE Director (via email) when the participant does not complete the check-offs before the end of the CASE Institute or if the time goes beyond the length of one PD day. The CASE Director follows up with an application for deferment, if appropriate.
- **Host Site Coordinator Responsibility** – Hosts help encourage participants not to miss. During virtual CASE Institutes, hosts help LTs identify absent participants and reach out to them. Hosts help LTs communicate absent participants to the CASE Director.
- **Executive Board** – The CASE Director submits all emergency deferments for approval to the CASE Executive Board.
- **Scholarship** – Participants with scholarships that do not end in a CASE Institute certification are ineligible for future scholarships and grants.

Appendix F – Participant Expectations Agreement

CASE PD Expectations

I understand and agree to follow the participant expectations and professional behavior guidelines. I understand that failure to abide by the participant expectations or professional behavior guidelines may lead to appropriate sanctions up to removal from the CASE PD event. I understand that I forfeit the entire registration fee, will not be certified, must return the curriculum and materials, and am responsible for my lodging and transportation required to return home should I be removed from the CASE PD event due to not meeting participant expectations or professional behavior guidelines.

Participant Expectations

1. Arrive on time and actively participate in the duration of the CASE PD event.
2. Interact and communicate positively and safely with all parties.
3. Remain committed to the learning experience as outlined in the CASE PD event.
4. Maintain professional, legal, and ethical conduct at all times. Avoid inappropriate behavior or sexual harassment with participants, Lead Teachers, hosts, or guests.
5. Complete all deliverables specific to the course *Scope and Sequence*.

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- I acknowledge that I am not entitled to any compensation or royalties concerning the use of the photos.
- I agree to release and forever discharge NCAE and its affiliates, successors, and assigns, officers, employees, representatives, partners, agents, and anyone claiming through them, in their individual and/or corporate capacities from any and all claims, liabilities, obligations, promises, agreements, disputes, demands, damages, causes of action of any nature or kind, known or unknown, which I, and anyone claiming on behalf of me, may have against Releasee in connection with this release.

Agreement

By registering for CASE PD, I am agreeing to the terms and conditions of the the *CASE Host Manual*. I have carefully read and fully understand all the provisions of this agreement and am freely, knowingly, and voluntarily signing.