

MASSP Strategic Planning

June 15, 2018



Agenda for the Session



Review New Strategic Planning Process

Review past Strategic Plan

Develop Core Ideology

Develop Envisioned Future

MASSP Board & Strategic Plan Team



President: Peter Hamilton, Principal @ Cut Bank High School

President-Elect: Jake Haynes, Principal @ Frenchtown High School

Past President: Joel Graves, Principal @ Lincoln County High School

Vice President: Justin Helvik, Principal @ Three Forks High School

MASSP State Coordinator: Paul Furthmyre, Principal @ MSDB

Directors:

Shawn Hendrickson, Region I, Principal @ St. Ignatius High School

TBD, Region II, Principal @ ?High School

Sheri Heavrin, Region III, Principal @ Townsend High School

Shawn Bleth, Region IV, Principal @ Malta High School

Shelly Weight, Region V, Principal @ St. Forsyth High School

KJ Poepping, Region VI, Principal @ Shepherd High School

Research for MASSP's Strategic Plan Process



A little more than a decade of research to help educational organizations develop sound and successful strategic planning processes has led to the blended work of *Jim Collins, Glenn Tecker and Peter Senge*. Educational organizations are unique because of the audiences served ... business function, social agency, non-profit status, publicly funded and accountable, multiple clients (children but also parents and relatives) ... are generally more diverse than a single business or non-profit would encounter. Each of these planning process researchers brings value to an approach that, in my experience, works for educational organizations allowing progress to meet the needs of all audiences mentioned. So some comments about the researchers ...

Jim Collins' Level 5 Leadership



“Level 5 leaders channel their ego needs away from themselves and into the larger goal of building a great company. It’s not that Level 5 leaders have no ego or self-interest. Indeed, they are incredibly ambitious – but their ambition is first and foremost for the institution, not themselves.”

Glenn Tecker's Will to Govern Well



“Volunteer leadership and staff must develop the desire, fortitude, expertise, knowledge and commitment to support effective governance structures, processes, and culture. The will to govern well allows successful board and staff leadership to converge and create the ability to lead the (organization) into the future.”

Peter Senge's Learning Organization



“...organizations where people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free, and where people are continually learning to see the whole together.”

MASSP Strategic Planning Terminology



Core Ideology describes our association's consistent identity that transcends all changes related to our relevant environment. It consists of two elements - **Core Purpose** - the association's reasons for being and **Core Values** - essential and enduring principles that guide our association.

MASSP Strategic Planning Terminology



Envisioned Future conveys a concrete yet unrealized vision for our association. It consists of a **Big Audacious Goal** – a clear and compelling catalyst that serves as a focal point for effort and **Vivid Descriptions** – vibrant and engaging descriptions of what it will be like to achieve the big audacious goal.

MASSP Strategic Planning Terminology



Assumptions about the future describe critical factors affecting the relevant world throughout the life cycle of the plan, often categorized as strengths, weaknesses, opportunities or threats.

Mega Issues are issues of overriding strategic importance, which reflect fundamental questions the association must answer and the major challenges the association will have to address in achieving our vision. They are usually related to trends.

MASSP Strategic Planning Terminology



Goal Statements describe the specific outcomes to members, the public, and other key stakeholders of the association that the association intends to achieve through its work over a 3-5 year cycle.

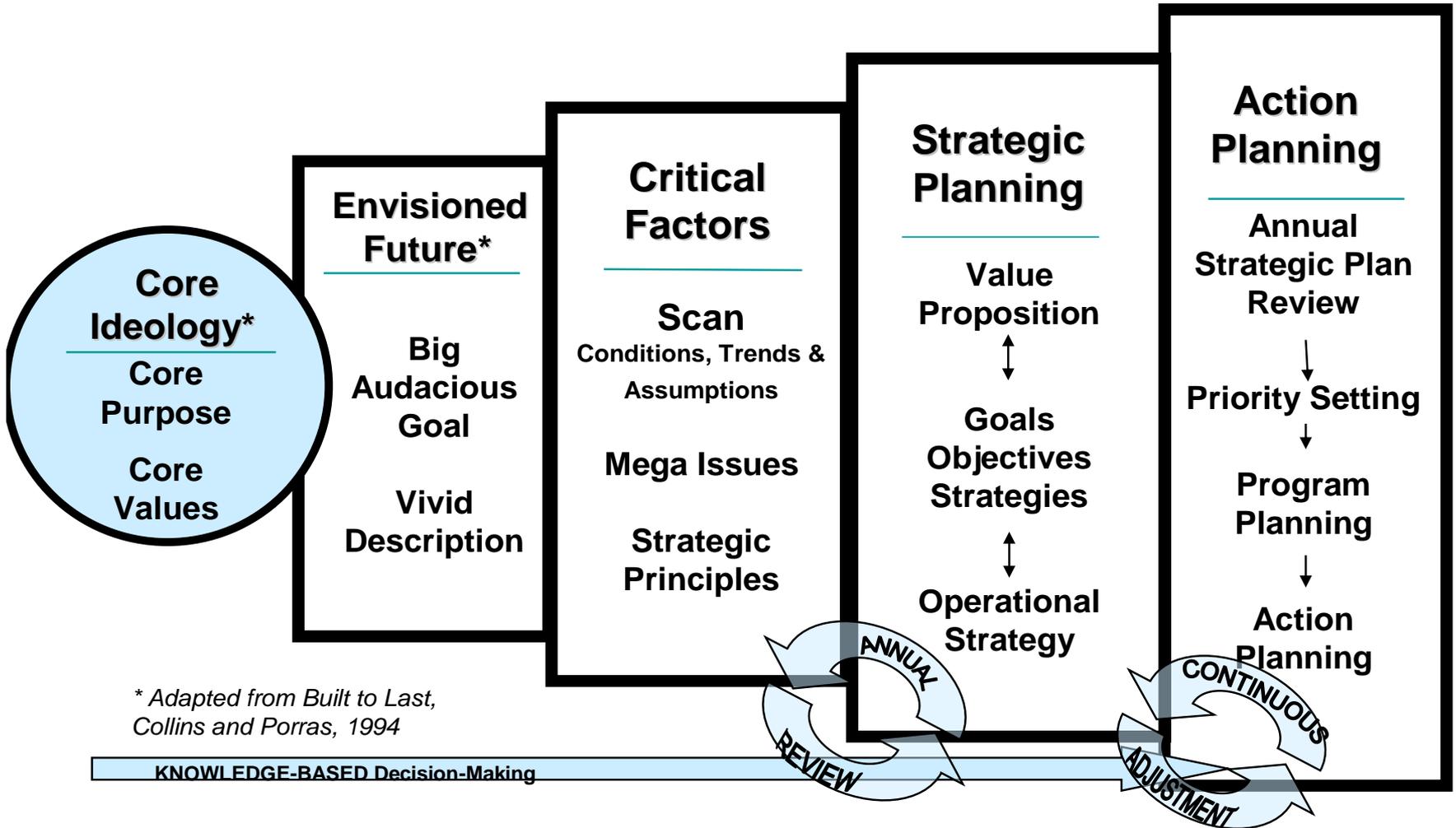
Strategic Objectives define the desired directions in which the association needs to move in order to accomplish its goals. Describes what we want to have happen with an issue and what would constitute success in observable or measurable terms. Strategic objectives are listed for each goal statement and are adopted and revised on an annual basis.

The Order of Strategic Planning



Five Planning Horizons

Timeless 30 years 20 10 5 3 2 1 year →



* Adapted from *Built to Last*, Collins and Porras, 1994

**Core Purpose
Core Values**

**Capacity &
Strategic
Position**

Envisioned Future

SCAN
Conditions, Trends
Assumptions & Wild Cards

Identity

Goal

Goal

Goal

Etc.

Direction

**Strategic
Objectives**

**Sample
Strategy Map**

Activity

Strategy

Strategy

Strategy

etc.

Action Plan			Resource Requirements	
Key Events	Responsibility	Target Date	Line item	\$, people

MASSP Strategic Planning Terminology



Today we begin with the Core Ideology and Envisioned Future.

Future planning will continue with Assumptions About the Future and Mega Issues dialogue.

In the future, we hope to establish Goal Statements and Strategic Objectives.

The result will be a new Strategic Plan 2018-22!

This process is based on organizational planning research and is the work of Jim Collins, Glenn Tecker and Peter Senge combined to work for educational associations.

Review of Current MASSP Strategic Plan



VISION of MTASCD

Educational Architects Leading School Communities to Build Brighter Futures

Review of Current MASSP Strategic Plan



Professional Development

1. MASSP Board will review the needs assessment at the April Meeting
 - a. MASSP Board will provide input regarding modifications to SAM
 - i. Results may direct future planning and training to include 'hot topics' and current issues in education.
2. Continued delivery of training
 - a. Work with SAM staff on coordination
 - b. Identify resources – local/state/online

Review of Current MASSP Strategic Plan



Professional Development

3. Board members will actively promote trainings
 - a. Encourage participation and attendance
 - b. Members use SAM online social media site to post trainings
4. Continued communications with MSU/U of M/Rocky Deans of Schools of Education
 - a. Maintain dialogue about current topics and issues in secondary administration and education.
 - i. Invite Deans of Schools of Education to the MASSP April annual meeting

Review of Current MASSP Strategic Plan



Membership Support and Involvement

1. Collaborative Information Clearinghouse

- a. SAM website – promote the site and encourage all members to register on the site.
- b. Forward information to SAM for posting and availability for members. Encourage all members to register on the site
- c. Regional directors will send agenda and minutes from regional meetings to association director or association staff.

Review of Current MASSP Strategic Plan



Membership Support and Involvement

2. Regional meetings:

a. Attendance

- i. Encourage and promote attendance through various strategies.

b. Agenda Development

- i. Information exchange – seek input from members regarding topics
- ii. Guest speakers (i.e. OPI)
- iii. Identify membership expertise
- iv. Offer model policies, legal support, liability coverage, educational articles, crisis support, networking and expertise to members.

Review of Current MASSP Strategic Plan



Member Recruitment and Retention

1. Engaging and Retaining MASSP Members

- a. Regional Directors, or their designee, will make personal contact with each eligible/aspiring/licensed MASSP member in their region not currently in an administrative role with an invitation to join.
 - i. Identify certified administrators not currently working as administrators and send a letter of invitation to join MASSP
- b. Mentoring for members
 - i. First year mentoring assignments available formally and informally through SAM.
 - ii. Engaging members in regional activities
 - iii. Attendance at the New Leaders conference
 - iv. Great Beginnings – additional contact with new members quarterly.
 - v. Schedule a new members meeting at MCEL

Review of Current MASSP Strategic Plan



Member Recruitment and Retention

2. Member Recruitment

- a. Directors are informed monthly by SAM about recruitment and member status process
 - i. Schedule new director and other board member training.
 - ii. August training for Directors about SAM membership status process in conjunction with New Leaders training
- b. Directors participate in recruitment process
 - i. Train directors about levels of MASSP membership including national levels of membership.
- c. Regional Directors will have personal contact with new administrators in their regions
- d. Regional Directors, or their designees, will have contact with retired administrators in their regions.

Review of Current MASSP Strategic Plan



Advocacy through Leadership

MASSP will collaborate with other education advocates to promote excellence of public education to build brighter futures for Montana Students.

1. Regional Directors, or their designee, will:
 - a. Communicate with MASSP members regarding issues, elections, candidates via the list-serve and the SAM website:
 - i. Communication with SAM leadership
 - ii. Promoting participation in advocacy training
 - b. Solicit participation of members in advocacy and outreach efforts

Review of Current MASSP Strategic Plan



Advocacy through Leadership

2. Voice for secondary schools at the legislature
 - a. School funding and school law
3. Regional Directors, or their designee, will solicit resolution ideas from membership through:
 - a. Utilizing the list-serve and the SAM website
 - b. Promoting full participation in the Delegate Assembly Process
 - c. Soliciting information from NASSP and other organizations.
 - i. Invite legislative candidates to school events and participate in coordinating meetings with the candidates.
4. MASSP State Coordinator to serve on SAM steering committee
 - i. 'Watchdog' the issues relevant to MASSP members

Discovering MASSP

Core Ideology and Envisioned Future



- A series of exercises to discover MASSP's Core Ideology and Envisioned Future will drive the rest of the work.
- Groups will be formed to allow all persons present to get their voice into the room for consideration.
- A recorder will digitally record the results of the group work on a [Google Doc](#) so all input can be shared.

Discovering MASSP Core Ideology



- Every association has a Core Ideology, consisting of the Core Purpose and the Core Values.
- The Core Ideology is not selected, it is discovered. The stated ideology should not be an unattained goal or aspiration but should speak to values that are firmly held at this time.

Core Ideology Exercises



- KEEP IN MIND: these are *not* wordsmithing exercises but are exercises to capture the authentic core purpose and core values of our association, not to create a “pretty statement.”
- The point is to discover the core values and purpose to which you are truly committed.

Discovering MASSP Core Ideology

Core Ideology = Core Purpose + Core Values

- **Core purpose** is the association's fundamental reason for being. An effective purpose reflects the importance people attach to the association's work—it taps their idealistic motivations—and gets at the deeper reasons for a particular association's existence.

Core Purpose Breakout Session



Estimated Time: 15 minutes for group discussions; 10 minutes for table reports; 10 minutes for group consensus.

- Each group writes a Core Purpose using the Criteria discussed. Ensure that the Core Purpose captures what participants believe to be MASSP's unique and specific reason for being. Record your work on the [Google Doc](#).

Continued on next page

Core Purpose Criteria



Yes	No	Do you find this purpose personally inspiring?
Yes	No	Does the purpose help you think expansively about the long-term possibilities and range of activities the association can consider over the next 100 years, beyond its current services, markets, industries, and strategies? (For example, Disney's purpose to make people happy helped propel the company from its initial strategy of cartoons into full-length feature animation, the Mickey Mouse Club, Disneyland, EPCOT Center, and so on.)
Yes	No	Does the purpose help you to decide what activities to not pursue, to eliminate from consideration?
Yes	No	Is this purpose <i>authentic</i> – something true to what the association is all about – not merely words on paper that “sound nice”?
Yes	No	Would this purpose be greeted with enthusiasm rather than cynicism by a broad base of people in our association and education community?
Yes	No	When telling your children and/or other loved ones about your membership in MTASCD, would you feel proud in describing your work in terms of this purpose?
Yes	No	Can you envision this purpose being as valid 100 years from now as it is today?

Core Purpose Breakout Session



- As a group, contemplate the extent to which you agree the Core Purpose meets the criteria established. If most of the people in the group cannot answer "Yes" to *all* of the above questions, then contemplate what amendments may be necessary to the Core Purpose to ensure its relevance and focus.
- Keep working on the Core Purpose until at least 2/3rds of the people in your group can honestly answer "Yes" to *all* of the questions (it's ok to suggest modifications to the previously-adopted Core Purpose, if necessary). Record your work on the [Google Doc](#).
- Each table reports out the results of their discussions.
- Group discusses as a whole and either affirms the Core Purpose or amends as necessary to ensure consistency with criteria established.

Discovering our Core Ideology



Core Ideology = Core Purpose + Core Values

- **Core values** are the association's essential and enduring tenets—a small set of timeless guiding principles or behavioral characteristics that require no external justification; they have *intrinsic* value and importance to those inside the program.
- **Core values** articulate how we conduct ourselves as we pursue our Core Purpose

Core Values Breakout Session



Estimated Time: 15 minutes for discussion; 10 minutes for reports; 10 minutes for developing group consensus

- As a group, contemplate the extent to which the previously-adopted MASSP Belief Statement/Core Values meets the criteria established on the following page. You may write a new belief if you wish. If most of the people in the group cannot answer "Yes" to *all* of the questions, then contemplate what amendments and/or consolidations of may be appropriate to reach approximately 5 Core Values of MASSP.
- Keep working on the Core Values until at least two-thirds of the people in your group can honestly answer "Yes" to *all* of the questions (it's ok to suggest consolidation, elimination, addition, etc. of core values previously adopted, if necessary). Record your work on the [Google Doc](#).
- *Continued on next page*

Testing Your Core Values



Yes	No	If you were to start a new organization, would you build it around this core value <i>regardless</i> of the industry ?
Yes	No	Would you want your organization to continue to stand for this core value 100 years into the future, no matter what changes occur in the outside world?
Yes	No	Would you want your organization to hold this core value, even if at some point in time it became a competitive disadvantage—even if in some instances the environment penalized the organization for living this core value?
Yes	No	Do you believe that those who do not share this core value—those who breach it consistently—simply do not belong in your organization?
Yes	No	Would you personally continue to hold this core value even if you were not rewarded for holding it?
Yes	No	Would you change jobs before giving up this core value?
Yes	No	If you awoke tomorrow with more than enough money to retire comfortably for the rest of your life, would you continue to apply this core value to your productive activities?

Core Values Breakout Session



- Select the values deemed by your group to be truly authentic core values.
- Do a final check on the core values to ensure that none of them fall into the category of “aspiration for the future” rather than authentic core values.
- Each table reports the results of their discussion.
- Group discusses as a whole and identifies approximately 5 core values that fully reflect the beliefs previously identified, as modified at each table.

Building an Envisioned Future



- Building the envisioned future requires both a **Big Audacious Goal**, providing an overall description of the intended description of the world as changed by MASSP's efforts and **vivid descriptions of success**.
- The envisioned future needs to be bold, yet believable and reachable, but only as a tough stretch, requiring an immense amount of effort and a good dose of good luck.
- Think of taking the resources you have at hand, consistent with your Core Purpose and Core Values, and applying those resources to the best of your collective abilities to improve the provision of services to members of MASSP over the next 10-15 years.

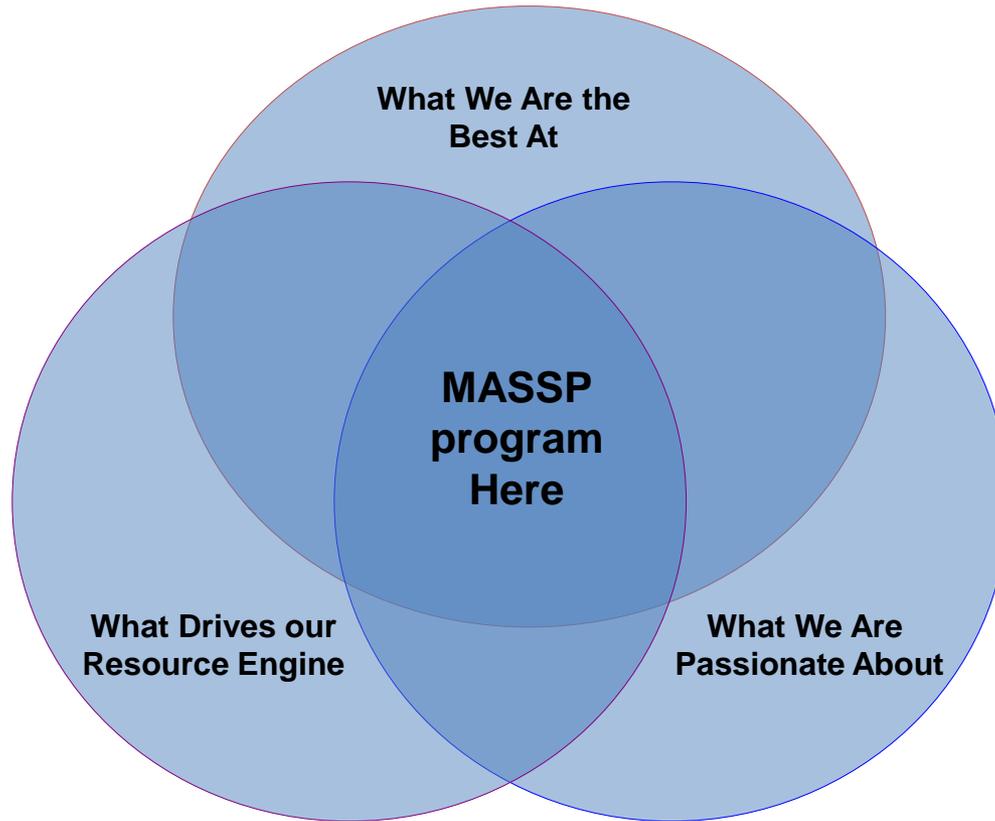
A Big Audacious Goal



Five criteria of a good Big Audacious Goal:

1. Are set with an understanding of how we will apply our limited resources to better the world in which we function.
2. Fit squarely in the three circles of our Hedgehog Concept.
3. Have a long time frame—10 to 15 years.
4. Should be clear, compelling and easy to grasp.
5. Directly reflect our core values and core purpose.

MASSP's Hedgehog Concept – The Focus of our Envisioned Future



Envisioned Future Exercise



Estimated Time: 20 minutes for drafting, 10 minutes for group discussion and gaining consensus.

- Each group drafts a proposed big audacious goal for MASSP using the criteria discussed. Using a 10-15 year planning horizon, identify the changes in the association, the membership, education in Montana, even the world, that you want to see as a result of MASSP's programs and services. Record your work on the [Google Doc](#).
 - The Big Audacious Goal must be consistent with the Core Purpose and Core Values previously identified.
 - The Big Audacious Goal should be supported by vivid descriptions of what it will be like to experience the success sought.
- Note: The more specific the descriptions are, the easier it will be for the public and our members to understand where MASSP is attempting to go with its programs and services and to provide meaningful feedback on the intended direction before finalized.

Envisioned Future Exercise



- Review the focus on the next page.
- Each group record their agreed upon Big Audacious Goal on one sheet and list the vivid descriptions. Record your work on the [Google Doc](#).
- Group discusses as a whole to determine consensus on the Big Audacious Goal and also the vivid descriptions.

Envisioned Future Focus



To help inform and provide focus to your exercise, consider using the following scenario:

- The date is 2025. You have now served MASSP as a member on the MASSP board for the last 10+ years. Tonight is your last board meeting and the local newspaper is running a story describing MASSP as you hope it to be as a result of the investment of the next 10 years of your life in improving it. Draft the best possible description of the association if everyone works together in pursuit of continuous improvement in service, effectively, consistently and efficiently, focused on the interests of children through the association, enjoying the benefit of some good luck along the way .
- Examples of areas to address in your description include:
 - First and Foremost, the impact association has on children
 - The Most valued Benefits, Products and Services
 - Delivery Systems
 - Governance Structure
 - Culture
 - Recognition and Esteem Among Colleagues and the Public

This work will be prepared for
your review and progress!



Thank you MASSP Strategic
Plan Participants for your
work to strengthen our
association through
Strategic Planning!

Scanning the Horizon



1. Identification of Strategic Assumptions Regarding the Future
2. SWOT Analysis
3. Mega Issues

SAM Environmental Scan



Tools to Anticipate Change... *Environmental Scanning*

- Tracking Trends
- SWOT Analysis



MCASE Macro Environmental Scan



1. Current Conditions
2. Trends
3. Assumptions About the Future

Five Key Factors to Consider:

- 1. Demographics**
- 2. Business / Economic Climate**
- 3. Legislation / Regulation**
- 4. Technology / Science**
- 5. Politics / Social Values**

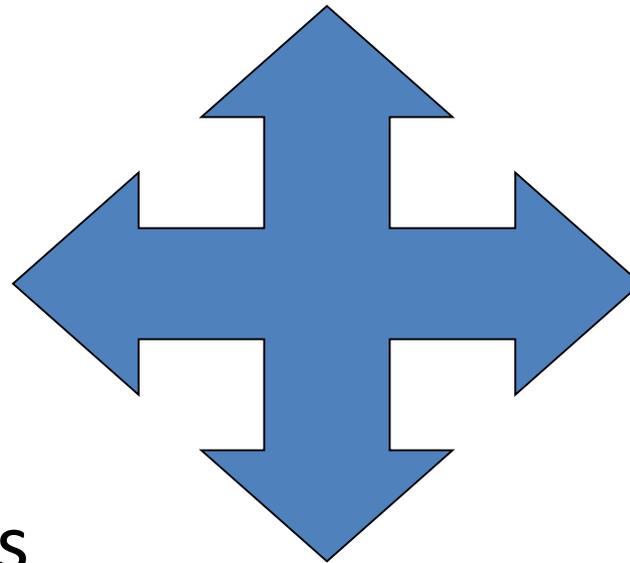
MASSP SWOT Analysis



Baseline

Strengths

Weaknesses



Opportunities

Threats

Exercise on Conditions, Trends and Assumptions



Estimated Time: 45 minutes

Each of the 2 Groups will record the following:

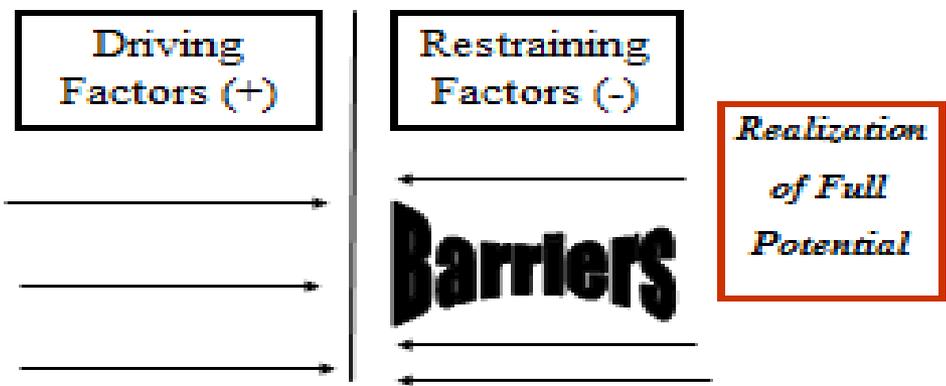
- Choose 2 or 3 Key Factor to consider
- Describe Current Conditions
- Describe Trends
- Make Assumptions about the Future
- Write Mega Issue Questions that respond to significant barriers to success
- Use a Google Doc to accomplish this
- A quick group report will be given

Exercise on Conditions, Trends and Assumptions



Key Factor: _____

15 minutes	15 minutes	15 minutes
Current State	Trends	Assumptions



Question 1: _____

Question 2: _____

Question 3: _____

45 minute exercise

Step 1

After discussing and documenting the current state, trends and assumptions regarding the future, use key factor analysis to identify two to three significant barriers to "success".

Step 2

Frame each issue as a question you cannot answer "yes" or "no".

Exercise on Conditions, Trends and Assumptions - Example



See the **SAMPLE** Exercise on Current Conditions, Trends and Assumptions about the Future Document

**Core Purpose
Core Values**

**Capacity &
Strategic
Position**

Envisioned Future

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Goal

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**Sample
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etc.

Action Plan			Resource Requirements	
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Exercise on Goals and Strategic Objectives



Goal Statements describe the specific outcomes to members, the public, and other key stakeholders of the association that the association intends to achieve through its work over a 3-5 year cycle.

Strategic Objectives define the desired directions in which the association needs to move in order to accomplish its goals. Describes what we want to have happen with an issue and what would constitute success in observable or measurable terms. Strategic objectives are listed for each goal statement and are adopted and revised on an annual basis.

Exercise on Goals and Strategic Objectives



Current MASSP Goal Areas in Strategic Plan

GOAL #1 -

Exercise on Goals and Strategic Objectives



Current MASSP Goal Areas in Strategic Plan

GOAL #2 –

Exercise on Goals and Strategic Objectives



Current MASSP Goal Areas in Strategic Plan

Goal #3 –

Exercise on Goals and Strategic Objectives



A possible means to focus goal areas:

1. Leadership
2. Professional Learning
3. Advocacy

Developing Group Consensus on these Goal Areas

Exercise on Goals and Strategic Objectives



30 minutes to work in groups. 10 minutes to report out

Each of the 3 Goal groups will discuss, gain consensus, and then record the following:

- A goal statement representing the Goal Area
- Strategic Objectives for each goal

Please record your digital device (Google Doc) so that we can project your work for the group to see.

A Job Well Done!



When we get to this slide, all strategic planners need to give themselves and their fellow planners a pat on the back because we have just completed the strategic plan identity (who we are) and analyzed the work of setting direction (where we want to go) through an environmental scan, and finally set goals (what we are doing) to put our plan in action!

The Strategic Board Agenda



**Discussion of
Mega Issue(s)**

**Review and Adjustment
of Strategy**

**Policy:
Public & Operational**

Routine Board Business

A Model For Annual Strategic Plan Update and Adjustment



A Process for Planning and Thinking Strategically



Strategy vs. Operational Planning

Strategic Planning

- Longer-term
- Driven by the vision
- Responsive to external environment
- Alignment of programs and services
- Establishes direction
- Leadership is accountable

Operational Planning

- Annual planning
- Driven by the strategic plan and ongoing operations
- Improvements on existing programs and services
- Establishes work priorities
- Staff and volunteer work groups are accountable



This work will be prepared for
your review and progress!



Thank you MASSP Strategic
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association through
Strategic Planning!