

SAM Office Transition Plan 2019



Developed 12-20-18

Approved by consensus of the SAM Executive Board 12-21-18

The resignation of our SAM Associate Director has resulted in our need to look deeply at the SAM services provided by our team to support our members, leading to disruptive innovation (clearly strategic thought created by a disruption of the norm). What is described below to create a transition plan is my (Kirk Miller) recommendation for SAM's office transition to move forward in continuing the critical needs of the organization for meeting SAM and Affiliate Strategic Plans and Member Services. This plan has been developed in full cooperation and effort of our great SAM Team -- Gary Wagner, Kim Scofield.

Considerations for Transition

- Options
 - Restructure with current staff
 - Hire replacement
 - Restructure with partial replacement
- Understand the budget impact of all options
- Identify the critical needs of organization for meeting SAM and Affiliate Strategic Plans and Member Services
- Hiring a position of the nature required (administrator experience and standing in the education community) at this time of year, would not develop the best pool of candidates
- Hiring a position at this time with the Legislative Session starting in a week, would limit the time of the current staff to create a hiring process, find a qualified applicant, and then, mostly, train the new SAM team member. The time to insure a successful induction of a new SAM staff member would be difficult at best and not in SAM's best interest right now.
- Develop a plan of restructure that allows the current SAM team to use their skills and experience to continue the SAM office support of affiliate strategic plans and member services.
- Implement a restructure with current staff plan through the spring and determine our effectiveness of meeting the SAM office support of affiliate strategic plans and member services.
- I'm confident with the skill set and communication ability of our current team that we will develop strategies to cover responsibilities that crossover areas of responsibility during this transition.

Restructure Plan

With our current SAM Team we create a responsibility structure of the Executive and two Director positions, and would redistribute the critical needs of the organization for meeting SAM and Affiliate Strategic Plans and Member Services in the following manner:

Executive Director - Kirk Miller - Broad Responsibilities:

- Leadership and management of office operations
- Advocacy*

- Legal
- Strategic planning for SAM and Affiliates
- Represent SAM and Affiliates at state and national education tables where it is important for SAM's voice to be heard

Director of Member Services and Professional Learning - Kim Scofield - Broad Responsibilities:

- Member Services
 - Communications
 - Website and online services (e.g. Conference App)
 - MemberClicks/Database tools for member productivity
 - Affiliate board meetings
 - SAM and Affiliate Awards/Years of Service Pins
 - SAM and Affiliate Elections and Appointment of Officers
 - Member organization for participating in state and national conferences
 - SAM research and reports that bring value to the association and the education community.
 - Management of grants and private, state and federal programs to support member services.
- Professional Learning
 - SAM LPLP
 - Conference and meeting planning
 - Training plans across SAM and Affiliates

Director of Operations - Finance, Membership, Conferences - Gary Wagner - Broad Responsibilities:

- Finances of SAM and Affiliates
 - Revenue development
 - Budget development
 - SAM Business partnerships
 - Management of Investments
 - Fiscal oversight of grants and private, state and federal programs
- Membership
 - Membership drive
 - Accounting for state and national affiliate membership (e.g. transmittals to national organizations - AASA, NASSP, NAESP, CoSN, CASE)
 - Membership reporting
- Conference development
 - Collaborate with SAM and Affiliate leadership in developing conference theme, goals, and agenda to meet the needs of members.
 - Site contracts, speaker engagement agreements, site management, exhibitor management, member services related to conferences

*Further consideration due to immediacy of advocacy needs for the Legislative session would be to contract with an individual who knows our SAM advocacy priorities and details of our Positions and Resolutions to assist during the 4 months of the legislative session.