

# SAM Strategic Plan Goals & Strategic Objectives Worksheet

Used beginning on 6-14-18 and up to 10-18-18 by the SAM Board of Directors

For each of the 3 goals, review the knowledge-based decision making questions and identify action to be taken to accomplish the objective:

1. What do we know about our stakeholders' needs, wants, and preferences that are relevant to this decision?
2. What do we know about the current realities and evolving dynamics of our environment that is relevant to this decision?
3. What do we know about the "capacity" and "strategic position" of our organization that is relevant to this decision?
4. What are the ethical implications?
5. What actions are required to accomplish the Strategic Objective?

You can add a Strategic Objective or Revise a Strategic Objective based on the discussion of your group.

Link to Google Doc: <https://docs.google.com/document/d/1mM25jnC-GmqALrGW4bf5RZ71UGpefSjNCCV4z4KTbsc/edit?usp=sharing>

Revisions to worksheet after 10-10-18 review by Kirk Miller are in red font for consideration of the Board

# 1. Leadership Involved in Decisions Impacting Education

**Goal Statement:** Write the statement here --- **SAM affiliate members modeling and promoting the highest levels of professionalism, integrity and leadership actively engages in impactful discussions on education. ku**

Goal 1 Team: Write the names of those on the team here --- Karen Underwood, Joel Graves, Linda Marsh, Tobin Novasio

*I have carried over several previous goals --- ku*

<b>Strategic Objectives:</b>	<b>1. What do we know about our stakeholders' needs, wants, and preferences that are relevant to this decision?</b>	<b>2. What do we know about the current realities and evolving dynamics of our environment that is relevant to this decision?</b>	<b>3. What do we know about the "capacity" and "strategic position" of our organization that is relevant to this decision?</b>	<b>4. What are the ethical implications?</b>	<b>5. What actions are required to accomplish the Strategic Objective?</b>
<p>1.1 SAM encourages integrity through being open and honest, fair, complying with the laws, promoting educational community interests, being open and adaptable, taking corrective action, and being consistent with supporting the organization's' values.(ku)</p>	<p>Our members recognize the imperative of financially supporting a solid education to all the students we serve. (ku)</p> <p>Our educators endorse strong standards for educator certification and licensure. (ku)</p> <p>Our educators recognize a greater educational community and seek to join with other agencies and organizations promoting common goals to enhance the educational programming we offer our students. (ku)</p>	<p>Our educators recognize the high commitment our local taxpayers provide our schools. (ku)</p> <p>Our educators know that federal policies and legislation are impactful to our day-to-day operations and decision making. We also recognize our commitment and strength that comes from local control. (ku)</p> <p>Public education is often portrayed in a negative light in the media and social media. We need to share our successes and actively be advocates for Montana's public schools. (TN)</p>	<p>Our educators daily make decisions that are reflective of higher goals and principles. (ku)</p> <p>Our educators are recognized within their communities as spokesmen for public education. (ku)</p> <p>Our educators are dependent on our SAM leadership and staff to actively engage in the onerous task of representing our perspectives at a multitude of meetings. (ku)</p> <p>Our educators recognize the impactful voice they each have when they reach out with a personal touch to contact decision makers one-on-one. (ku)</p> <p>Our educators recognize the impact of personal stories. (ku)</p>	<p>We need to have a coherent agenda based on a common philosophical base. (ku)</p> <p>As an organization we need to make decisions in light of the students of Montana not just our own communities. (ku)</p> <p>We need to recognize the political landscape and remain focused on goals promoting public education and education for all our students. (ku)</p> <p>We need to respect that our members work for unique school boards in diverse communities. We need to avoid putting members in adversarial situations in their home districts. (TN)</p>	<p>We need continued presence in educational conversations including but not limited to MT-PEC, the state legislature, federal activities. (ku)</p> <p>We need to explore and discern our methods for greater influence and recognize a 365-day calendar for action. (ku)</p> <p>SAM should be the "go to" organization for the best information on Montana's schools and school needs. (TN)</p> <p>We need continued development of research based materials for school leaders for use in promoting the strength of Montana schools. (LM)</p> <p>We need continued development of research based mterials for school leaders on major issues such as school safety, suicide prevention, etc. (LM)</p>

<p>1.2 SAM ensures that concern for the desired result does not subvert fairness, honesty, respect and courtesy for others with whom one comes into contact. (ku)</p>	<p>We recognize that concerns for finances, safety, and recruiting/retaining quality educators places strain on our local systems. (ku)</p> <p>We recognize that there are lobbyists for other organizations that may share part of our “platform.: (ku)</p> <p>We recognize the influence our local governing bodies (school boards, etc.) hold. (ku)</p> <p>We recognize the data gathered through various tools including GEMS, legislative study committees, local data, federal reporting statistics. (ku)</p>	<p>We recognize that we are all entrusted to provide a quality educational experience in varied settings of size, demographics, geography, and socio-economics. (ku)</p>	<p>We recognize that what challenges us and makes us different is also what provides the strength of our consensual positions. (ku)</p>	<p>We are challenged to think beyond our current responsibilities to support the greater good for students across the state. (ku)</p>	<p>We need prioritize, agreed upon positions of guidance. (ku)</p> <p>ASAm memers and staff need to continue to work to ensure fairness, honesty, respect, and courtesy in promoting professional learning and advocacy. (LM)</p>
<p>1.3 SAM enlists and guides the talents and energies of its membership towards promoting the goals of the organization. (ku)</p>	<p>We recognize the strength and experience of our committed educators. And experienced SAM staff (ku)</p>	<p>We recognize the limitations of time and resources of each of our members and place responsibilities in the hands of the SAM staff on our behalf. (ku)</p> <p>We also recognize the familiarity SAM has of our needs and talents and are willing to answer their calls for assistance when timely. (ku)</p>	<p>We recognize the advantages of continued growth and learning as reflected by SAM in-services, LPLP, networking communications, and advancing use of technology for effective communication. (ku)</p>	<p>We need to participate in a timely way to better serve those entrusted with carrying out our priorities. (ku)</p>	<p>We need to actively acknowledge and support our Delegate Assembly activities, attend our affiliate and SAM business and general membership meetings, and communicate our evolving perspectives to our SAM staff and fellow SAM members in accordance with established communications. (ku)</p> <p>We need to continue to utilize the SAM Needs assessment to establish priorities for conference themes and meeting agendas. (LM)</p> <p>Through the SAM Investment and Finance Committee,, we need to continue to review the financial well being of SAM and it’s affiliates. (LM)</p>

## 2. Advocacy

**Goal Statement:** Write the statement here --- **SAM members will be equipped with accurate information and prepared to use it to advocate for public education.**

Goal 2 Team: Write the names of those on the team here ---Peter Hamilton, Laurie Barron, Justin Helvik, Jon Konen, Paul Furthmyre

<i>Strategic Objectives</i>	<i>1. What do we know about our stakeholders' needs, wants, and preferences that are relevant to this decision?</i>	<i>2. What do we know about the current realities and evolving dynamics of our environment that is relevant to this decision?</i>	<i>3. What do we know about the "capacity" and "strategic position" of our organization that is relevant to this decision?</i>	<i>4. What are the ethical implications?</i>	<i>5. What actions are required to accomplish the Strategic Objective?</i>
2.1 SAM will promote equitable access to quality education for all students through equitable, adequate funding of public schools. km	Members support public dollars staying in public schools. LB	There is a strong push for tax payer dollars to follow the student, even in private schools. LB	SAM has the capacity and resources to promote keeping public dollars in public schools. LB	Do all students have equal access to quality education in the public arena? LB	SAM DA LB SAM Legislative Network LB
2.2 Unified front with MT-PEC (SAM, MTSBA, MASBO, MREA, MFPE, MQEC) RD	MT-PEC members surveyed and individual Delegate Assemblies provide advocacy priorities RD	MT-PEC continues to collaborate in state and federal advocacy SAM has advocacy priorities separate and jointly from MT-PEC RD	"Hang together, or hang separately" RD	Continued positive relationship RD	
2.3 Utilize Legislative Network for accurate information sharing and two way communication RD	DASC is part of the Legislative Network; provides a filter and transparent communication among SAM membership RD	It works! Things come up during the legislative session and therefore the two-way communication is critical RD	Timely two-way communications for advocacy is a weakness RD	Members represent their respective affiliates RD	Centralized communications system: Spend time with each affiliate to ensure everyone knows how to get on and use. RD
2.4 Build capacity of SAM membership to develop effective advocacy strategies RD	Continue to provide PD opportunities for interested members, and outreach RD	Legislative Network & Federal Relations Coord. work well with SAM membership RD	We have the capacity & expertise to provide professional learning & outreach within and from SAM members RD	informed, nonpartisan, for the betterment of public education RD	Create or find a series of advocacy skill building videos of 3-5 minutes to be distributed to affiliates. Create an advocacy strand at MCEL 2019. RD
2.5 Build Montana specific federal advocacy RD	Developed through the DA process to establish federal priorities RD	Particularly divisive right now RD	Members currently rely too heavily on a few federal advocacy experts..Build capacity of broader membership RD	Maintain nonpartisanship RD	Provide monthly Montana specific advocacy talking points RD

### 3. Professional Learning and Services

**Goal Statement:** Write the statement here --- **SAM will extend and expand the professional learning delivery system using the expertise of the SAM affiliate's, as well as other service providers through professional development, mentorship, and other member services.**

Goal 3 Team: Write the names of those on the team here --- Pam Meier, Shelley Andres, Craig Crawford, Jake Haynes

<i>Strategic Objectives</i>	<i>1. What do we know about our stakeholders' needs, wants, and preferences that are relevant to this decision?</i>	<i>2. What do we know about the current realities and evolving dynamics of our environment that is relevant to this decision?</i>	<i>3. What do we know about the "capacity" and "strategic position" of our organization that is relevant to this decision?</i>	<i>4. What are the ethical implications?</i>	<i>5. What actions are required to accomplish the Strategic Objective?</i>
3.1 Provide PD using social media	Our stakeholders' expect administrators to stay current on changing topics (PM & SA)	Realistically, time is a factor so innovative ways using technology should be used to meet professional learning and the many services provided by SAM (PM & SA)	We know and recognize the benefits of continued growth and learning as reflected by SAM in-services, LPLP, Montana ED Chat, ED Camp, networking communications, and advancing use of technology for effective communication (PM & SA)	Stay current in a timely fashion to better serve our students and community (PM & SA)	Continued involvement in Montana Ed Chat, Ed Camp, technology, conferences, and involvement in SAM. (PM & SA)
3.2 Mentorship	New members ask for professional development to enhance their leadership expertise through the SAM mentor program. (PM)				Continued tracking of the new members participation in the SAM mentor program. (PM)  Yearly needs assessment to gain feedback and insight into the needs of new members. (PM)
3.3 Membership					<b>Maintain stability of membership and seek to involve administrators who are not members. Develop consistent vacancy fill information and statistical information across administrative position openings.</b>