

SAM Strategic Planning

June 14, 2018



Agenda for the Session



- Review of SAM Strategic Plan 2014-18
- Review Environmental Scan
- Exercise on Goal Setting

SAM 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.

SAM 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.

SAM 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.

SAM 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.

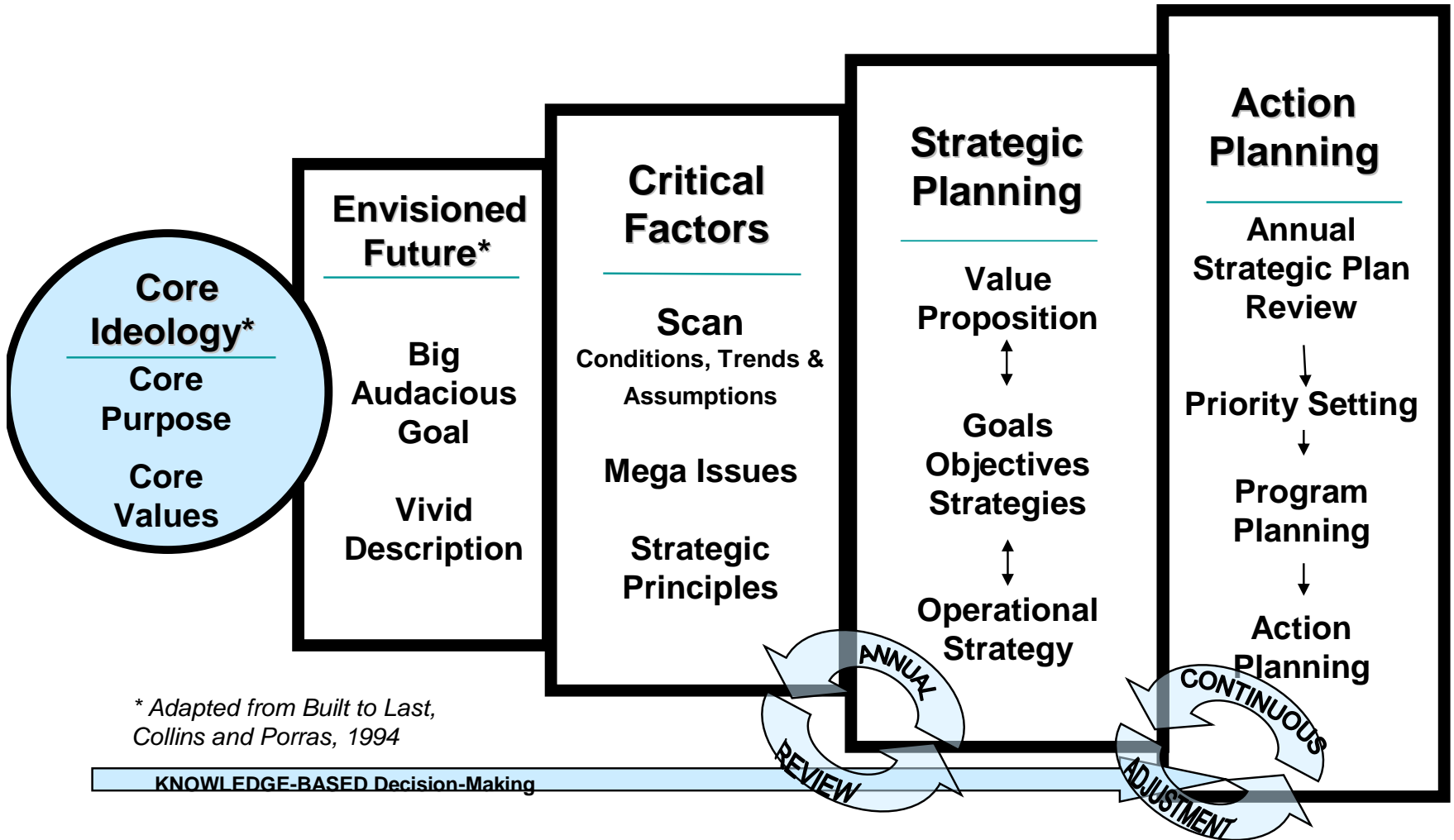
Strategic Objectives define the desired directions in which the association needs to move in order to accomplish its goals. Describes what we want to have happen with an issue and what would constitute success in observable or measurable terms. Strategic objectives are listed for each goal statement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

KNOWLEDGE-BASED Decision-Making

Discovering our 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.

SAM Core Ideology – Core Purpose



SAM ... Visionary leaders united in providing, advocating, and creating education excellence for Montana students!

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

SAM Core Ideology – Core Values



Leadership: We believe that instructional leadership provided by school administrators is essential for empowering, inspiring, engaging, and helping students to grow, succeed, and lead.

Integrity & Professionalism: We promote and demonstrate the highest level of integrity and professionalism, both organizationally and individually. We believe it is these traits that create the foundation vital for success.

Advocacy: We serve as a united, proactive organization of educational leaders that advocate for State and National legislation to ensure Montana students will receive a quality education supported by adequate and sustainable funding. We strive to assure that all students have equal access, are safe and healthy, and will be successful.

Professional Learning & Services: We believe that high quality professional development, mentorship, and supportive member services are critical to individual member and Montana student success.

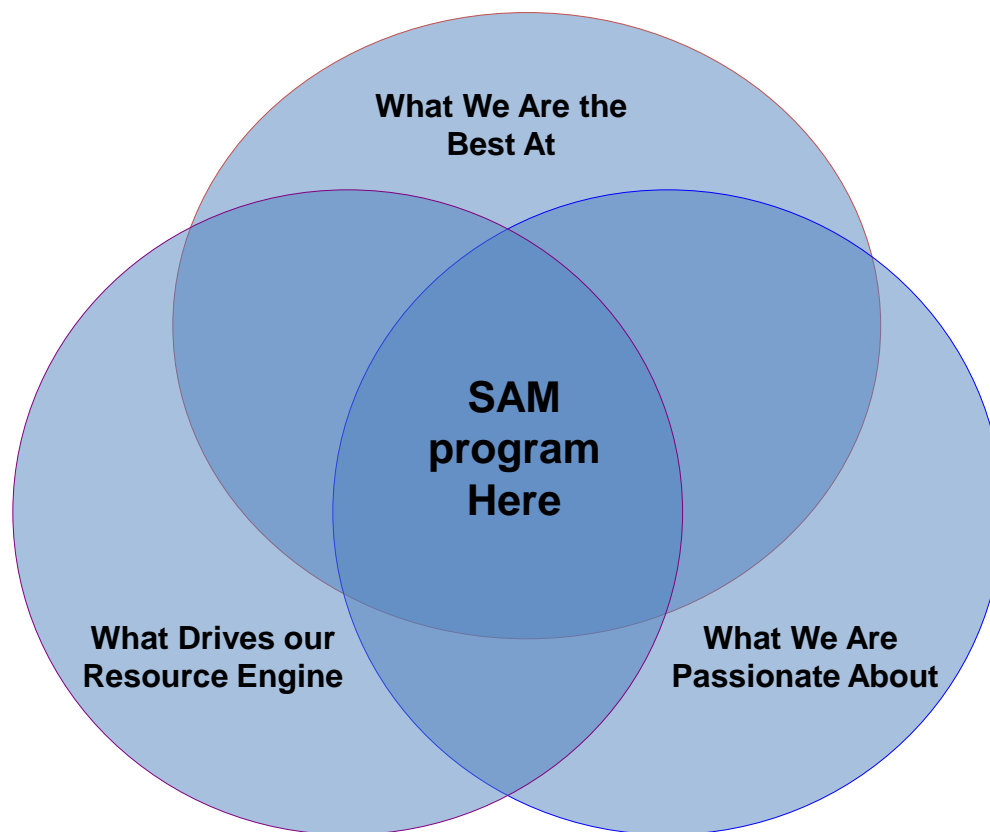
A Big Audacious Goal



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.

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



SAM Envisioned Future – Big Audacious Goal



SAM is a member-led, model education organization dedicated to developing instructional leaders advocating for student success. SAM is held in highest regard by all stakeholders for providing strategies, resources and tools to positively impact educational excellence for *all* Montana students.

SAM Envisioned Future—Vivid Descriptions



Instructional leaders are progressive professionals who work collaboratively with parents, educators, businesses, and communities to provide the highest quality of education and professional development possible.

SAM is an organization that actively participates in the development and promotion of legislation and the securing of funding to aid all students in achieving their maximum potential through opportunity and resources.

SAM has established effective networking, mentoring, and collaboration with members and all stakeholders to promote our core values – leadership, integrity and professionalism, advocacy, and professional learning and services.

SAM provides Montana leaders with high quality professional development opportunities based on research and best practice. All educators embrace continual professional growth. Innovative professional learning strategies lead to nationally recognized, unique Montana cultural experiences for education leaders in our state and around the world.

SAM's effort creates a positive perception that public education is the best for Montana's students by telling our story. All students are actively engaged in their education having access to appropriate resources to graduate college and career ready. There is a high level of trust and collaboration between the home and school.

SAM Goals and Strategic Objectives



1. Professionalism, Integrity, and Leadership: SAM models and promotes the highest levels of professionalism, integrity and leadership of its affiliates to create a foundation vital to success.

Strategic Objectives:

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 organizations' values.

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.

1.3 SAM enlists and guides the talents and energies of its membership towards promoting the goals of the organization.

1.4 SAM models these traits through advocacy at the local, state, and national levels.

SAM Goals and Strategic Objectives



2. Advocacy: SAM members will be equipped with accurate information and prepared to use it to advocate for public education.

Strategic Objectives:

2.1 SAM will maintain a united front with MT-PEC by SAM participation in MT-PEC meetings and communication to members through weekly SAM Update E-mail.

2.2 SAM will utilize the Steering Committee that includes one person from each SAM affiliate to identify current educational issues.

2.3 SAM will provide quality resources that contain current educational facts and implications to all stakeholders.

2.3.1 Federal relations leaders of each affiliate will collaborate to develop the SAM federal advocacy package.

2.4 SAM will provide quality opportunities to learn about the resources available and training that leads to active advocacy.

2.5 SAM will research structure and staffing necessary to accomplish the advocacy goals.

SAM Goals and Strategic Objectives



3. Professional Learning and Services: 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.

Strategic Objectives:

3.1 Professional Development

Provide professional development using social media

3.1.1 Montana Ed Chat on Twitter – Professional learning service OR SAM Ed Chat on Twitter – administrators got together once a week – track the number of -- Tuesday from 7-8 -- #MTedchat

3.1.2 ED Camp – professional development provided to workshop attendees; defining SAM's role.

3.1.3 Technology Professional Development – work with SAM members on social media and technology

SAM Goals and Strategic Objectives



3. Professional Learning and Services: 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.

Strategic Objectives:

3.2 Mentorship

3.2.1 Extend the SAM mentor program

3.2.2 Track the number of new members that participate in the SAM mentor program and other learning opportunities provided by SAM or affiliates

3.2.3 Continue Needs Assessment Survey of membership to gain insight in satisfaction and needs

3.3 Membership

3.3.1 Maintain stability with membership while administrative positions are cut

3.3.2 Maintain current services while implementing new social media services

SAM Strategic Plan Report



[SAM Strategic Plan 2014-18](#)

[Strategic Plan Update – 4th Quarter 2017-18](#)

SAM 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**

Results of Scanning the Horizon



[SAM Environmental Scan Results 4-6-18](#)

Demographics

Business/Economic Climate

Legislation/Regulation

Technology/Science

Politics/Social Values

Exercise on Goals and Strategic Objectives



Consistent with your Core Ideology and Envisioned Future, identify 3-5 - year base camp goal areas that are intended, in combination as a whole, to place SAM incrementally closer to its Envisioned Future. In other words, if the Envisioned Future is 20 years, the 4 year base camps should, in combination, be designed to place the district 1/5 of the way to accomplishing its envisioned future.

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



Established Core Values for 2014-18 Strategic Plan

Leadership: We believe that instructional leadership provided by school administrators is essential for empowering, inspiring, engaging, and helping students to grow, succeed, and lead.

Integrity & Professionalism: We promote and demonstrate the highest level of integrity and professionalism, both organizationally and individually. We believe it is these traits that create the foundation vital for success.

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Exercise on Goals and Strategic Objectives



A possible means to focus goal areas:

1. Leadership Involved in Decisions Impacting Education
2. Advocacy
3. Professional Learning and Services

Developing Group Consensus on these Goal Areas

Exercise on Goals and Strategic Objectives



30 minutes to work in groups. 15 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 use the [Google Doc](#) template to record your work so we can project your work for the group to see.

How to Establish the Goals & SO



In your Goal Team, answer 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?

Recorder, document your input on the [Google Doc](#)

Add Strategic Objectives as discussed by your group

Select a spokesperson for your group to describe your work

A Job Well Done!



Congrats ! The SAM Board has 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 SAM Strategic Plan will be updated by the SAM Office Team based upon the work of the SAM Board today!

Thanks!!

Planning Strategically Checklist

Check the box that best describes your association.	A Strength	Room for Improvement	Don't have
Environmental “Scan” – an annual review of external conditions that could impact future planning.			
Core Purpose – is relevant, clear and responsive to our environment			
Core Values – are a set of core behaviors necessary to fulfill our purpose			
Envisioned Future (Vision/Big Audacious Goal and Vivid Description) – reflects a longer-term unrealized goal and vivid description driving shorter-term planning			

Planning Strategically Checklist

Check the box that best describes your association.	A Strength	Room for Improvement	Don't have
<p>Goals – are stated outcomes to be achieved in a shorter-term (3-5 years) planning horizon.</p>			
<p>Objectives – are direction setting statements within each goal area.</p>			
<p>Prioritization of Objectives and Activities – a process for leadership to identify shorter-term priorities within the longer-term plan.</p>			
<p>Schedule for Plan Review – a commitment to following a schedule of ongoing strategic plan review and assessment.</p>			

The Strategic Board Agenda



**Discussion of
Mega Issue(s)**

**Review and Adjustment
of Strategy**

**Policy:
Public & Operational**

Routine Board Business