

MTASCD Strategic Planning 2017-18



Agenda for the Session



Review New Strategic Planning Process

Review past Strategic Plan

Develop Core Ideology

Develop Envisioned Future

MTASCD Board & Strategic Plan Team



President: Robin Arnold, Principal @ Morning Star Elementary, Bozeman

President-Elect: Andrea Meiers, Executive Director @ Alliance for Curriculum Enhancement

Executive Director: Jerry Scott, Former ACE Exec. Director & Supt. of Schools, Carbon County

Past President: Steve Engebretson, Superintendent Brockton Public Schools

Directors:

Scott A. Dubbs, Curriculum Director, Lewistown Public Schools

Barbara Frank, Principal, Saddleback Elementary, Belgrade Public Schools

Diana Knudson, Director, Golden Triangle Curriculum Cooperative

Dr. Robin Miller, Curriculum Director, Bozeman Public Schools

Kim Stanton, Curriculum Consultant, Prairie View Curriculum Consortium

Melissa Tovaas, Center for the Collaborative Classroom

Research for MTASCD'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.”

MTASCD 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.

MTASCD 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.

MTASCD 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.

MTASCD 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

Identity First

Core
Purpose
and
Core Values

Who are we?

Direction Second

Big
Audacious Goal

Where are we going ?

Three to Five Year Plan
Goals & Objectives

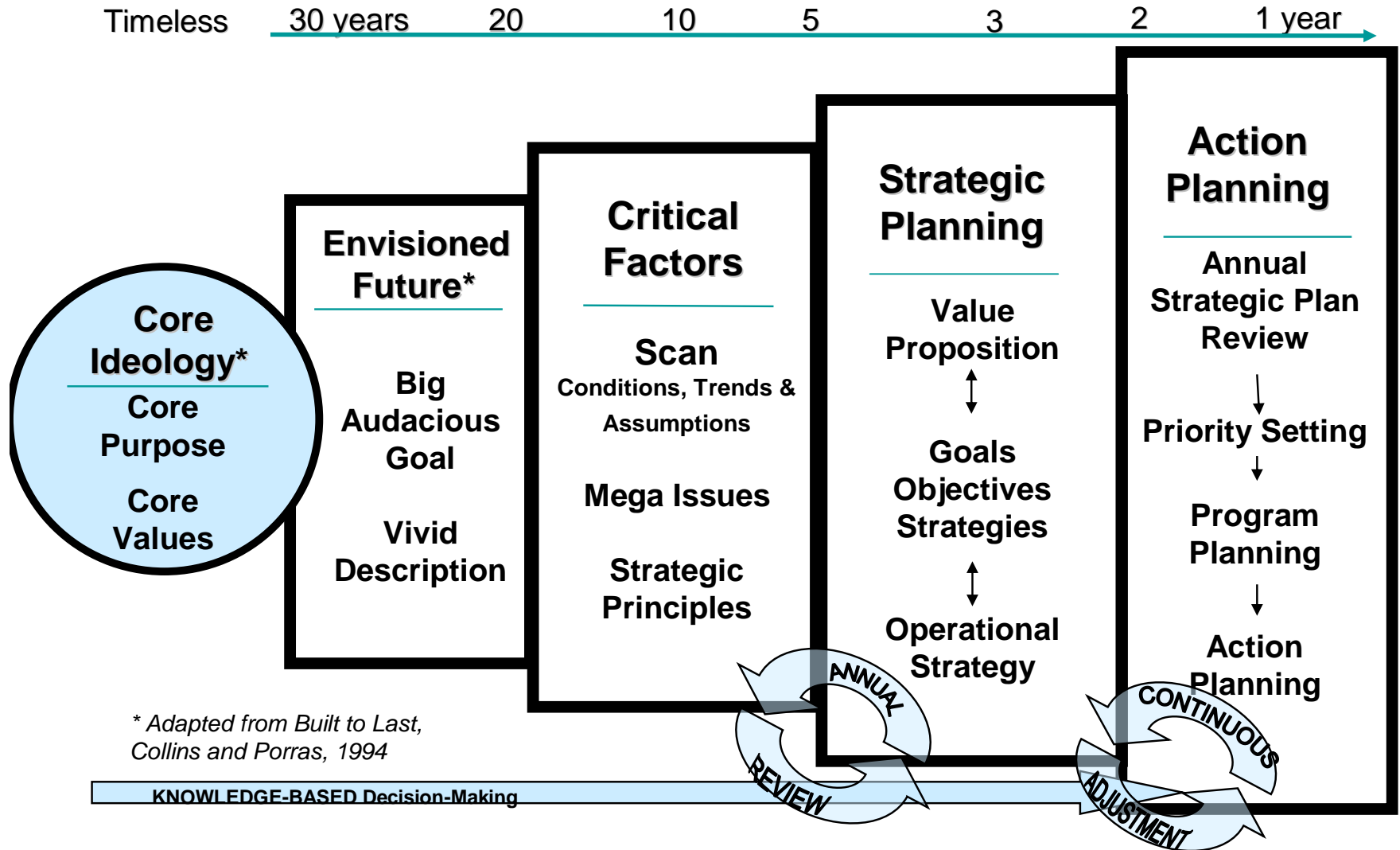
Activities Third

Strategies
and
Actions

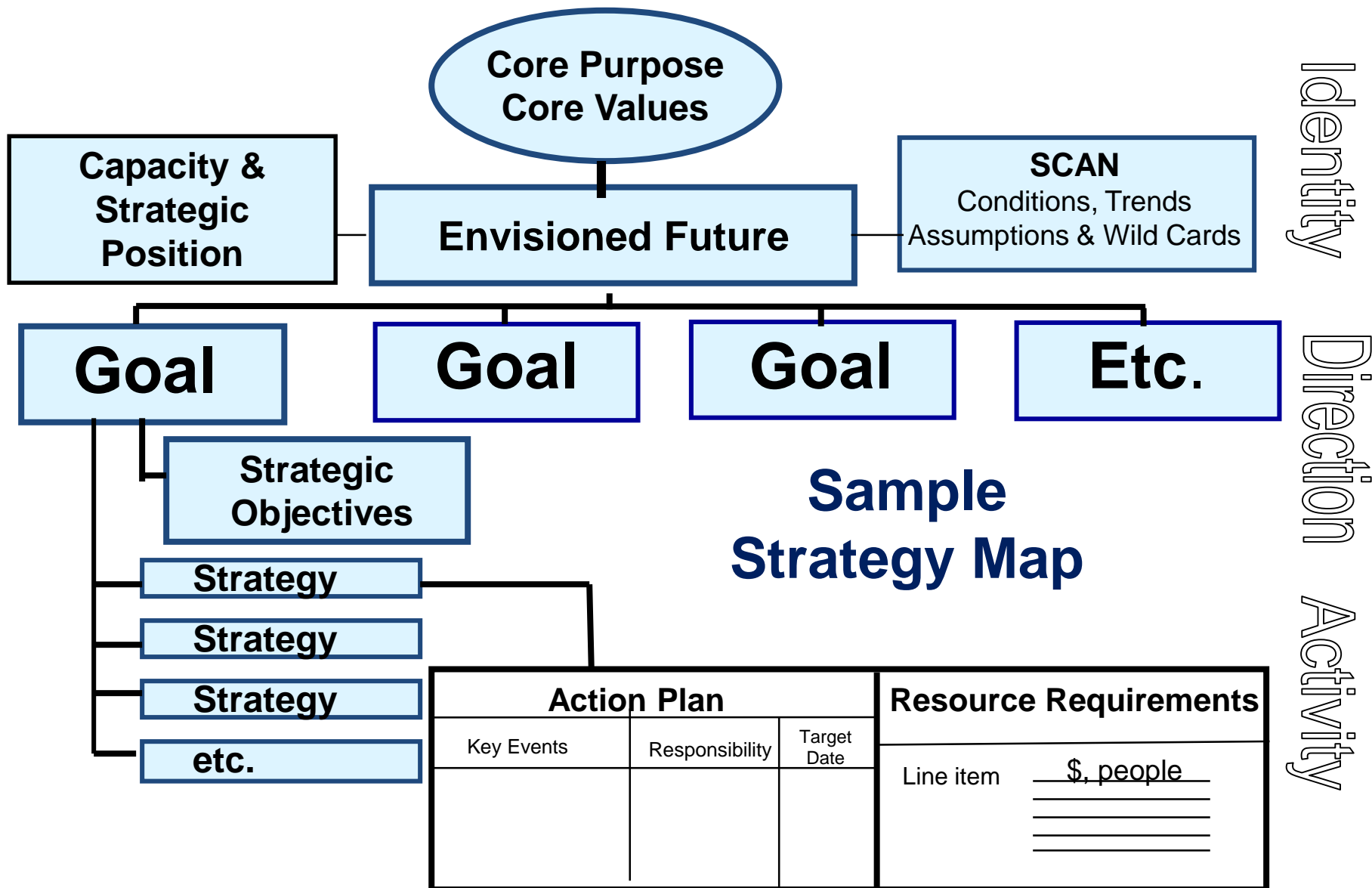
What are we doing?

Who will do what?

Five Planning Horizons



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



MTASCD Strategic Planning Terminology



Tonight 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 2017-21!

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 MTASCD Strategic Plan



VISION of MTASCD

Working together to promote success for all Montana students.

MISSION of MTASCD

The mission of Montana ASCD is building and fostering collaborative partnerships to produce meaningful, effective and timely professional learning for all educators.

Review of Current MTASCD Strategic Plan

MTASCD GOALS

1. To assist all state educational agencies with curriculum and supervision development.
2. To stimulate the participation of professional educators in curriculum work.
3. To encourage local, regional and state research in curriculum and problems.
4. To disseminate curricular materials, and to acquaint professional educational workers with these materials, membership and program of the Association for Supervision and Curriculum Development.
5. To influence legislation that impacts curricular areas.

Discovering MTASCD



Core Ideology and Envisioned Future

- A series of exercises to discover MTASCD'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 MTASCD 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 MTASCD 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 MTASCD's unique and specific reason for being.

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).
- 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 MTASCD 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 MTASCD.
- 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).
- *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.

This work will be prepared for
your review and progress!



Thank you MTASCD Strategic
Plan Participants for your work
to strengthen our association
through Strategic Planning on
6-19-17!

MTASCD Strategic Planning 9-28-17



Goals for this Strategic Planning Session

1. Review Core Ideology Established 6-19-17
2. Establish Envisioned Future
3. ~~Scan The Horizon to Determine Current Conditions, Trends, Assumptions About the Future, and Mega Issues~~ did not get to this

Thanks in advance for your effort to establish an outstanding Strategic Plan for MTASCD!

The Order of Strategic Planning

Identity First

Core
Purpose
and
Core Values

Who are we?

Direction Second

Big
Audacious Goal

Where are we going ?

Three to Five Year Plan
Goals & Objectives

Activities Third

Strategies
and
Actions

What are we doing?

Who will do what?

Review of Strategic Plan 6-19-17



Established the Core Ideology for MTASCD!

MTASCD Core Purpose (Developed 6-19-17)

Montana ASCD builds collaborative partnerships bridging Montana Education communities to facilitate supportive professional learning networks and disseminate instructional best practices that benefit the whole child.

Review of Strategic Plan 6-19-17



MTASCD Core Values (Developed 6-19-17)

- **Collaborative partnerships:** *We create* opportunities for collaboration among thought leaders to build a community of learners centered on best practices.
- **Supportive Professional Learning Networks:** *We promote* engagement in professional learning by fostering safe, supportive learning networks.
- **Best Practices:** *We explore* current practices in diverse Montana education communities and the nation to identify those that are most effective and beneficial to support learning.
- **Focus on the Whole Child:** *We adhere to and advocate for* the five tenets of the ASCD Whole Child initiative (Healthy, Safe, Engaged, Challenged and Supported).

MTASCD 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.

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 MTASCD'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 MTASCD over the next 10-15 years.

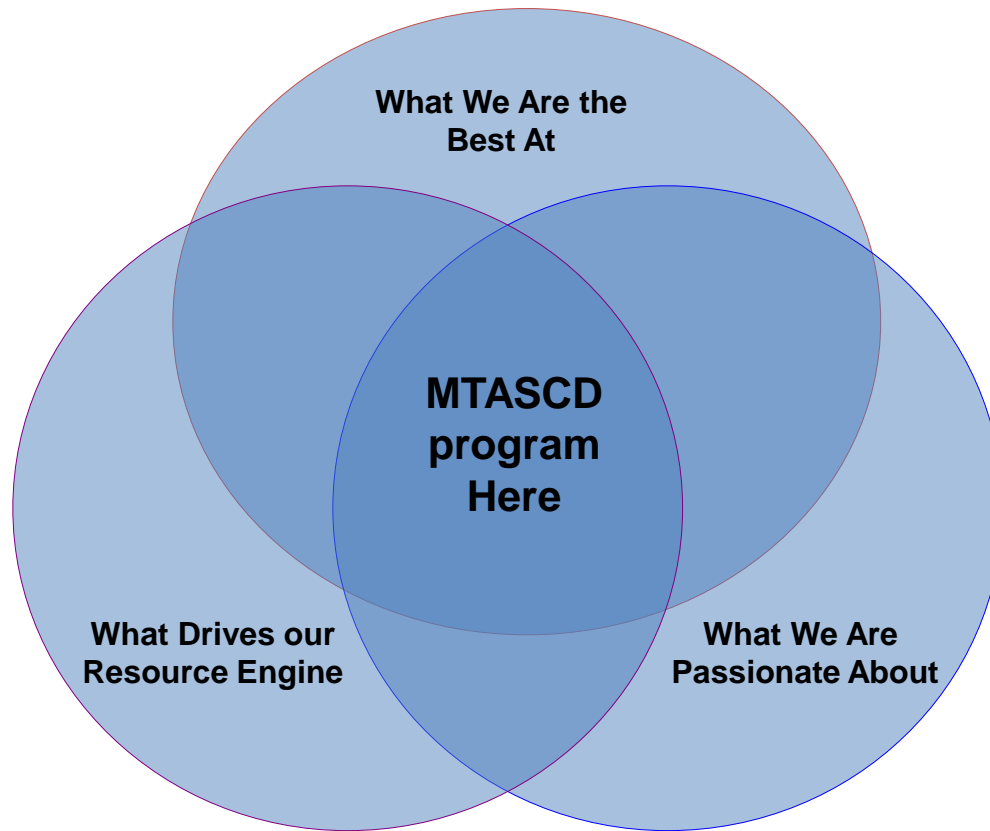
A Big Audacious Goal



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.

MTASCD'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 MTASCD 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 MTASCD's programs and services.
 - 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 MTASCD 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 the Google Doc, then list the vivid descriptions.
- 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 2027. You have now served MTASCD as a member on the MTASCD board for the last 10+ years. Tonight is your last board meeting and the local newspaper is running a story describing MTASCD 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

Envisioned Future Exercise



- Each group reports on their agreed upon Big Audacious Goal on the Google Doc, then describes the vivid descriptions.
- Group discusses as a whole to determine consensus on the Big Audacious Goal and also the vivid descriptions.
- Consensus Big Audacious Goal and Vivid Descriptions are written.

This work will be prepared for
your review and progress!



Thank you MTASCD Strategic
Plan Participants for your work
to strengthen our association
through Strategic Planning on
9-28-17!

MTASCD Strategic Planning 11-30-17



Goals for this Strategic Planning Session

1. Review Core Ideology and Envisioned Future
2. Scan The Horizon to Determine Current Conditions, Trends, Assumptions About the Future, and Mega Issues

Thanks in advance for your effort to establish an outstanding Strategic Plan for MTASCD!

Review of Strategic Plan 6-19-17



Established the Core Ideology for MTASCD!

MTASCD Core Purpose (Developed 6-19-17)

Montana ASCD builds collaborative partnerships bridging Montana Education communities to facilitate supportive professional learning networks and disseminate instructional best practices that benefit the whole child.

Review of Strategic Plan 6-19-17



MTASCD Core Values (Developed 6-19-17)

- **Collaborative partnerships:** *We create* opportunities for collaboration among thought leaders to build a community of learners centered on best practices.
- **Supportive Professional Learning Networks:** *We promote* engagement in professional learning by fostering safe, supportive learning networks.
- **Best Practices:** *We explore* current practices in diverse Montana education communities and the nation to identify those that are most effective and beneficial to support learning.
- **Focus on the Whole Child:** *We adhere to and advocate for* the five tenets of the ASCD Whole Child initiative (Healthy, Safe, Engaged, Challenged and Supported).

Review of Strategic Plan 9-28-17



Established the Envisioned Future for MTASCD!

MTASCD Big Audacious Goal (Developed 9-28-17)

MTASCD is recognized as the leading organization for access to professional learning, building collaborative partnerships among thought leaders, resources, and advocacy to continuously serve the whole child throughout Montana and our geographical regions.

Review of Strategic Plan 9-28-17



MTASCD Vivid Descriptions of Envisioned Future (Developed 9-28-17)

- **Thought Leaders** - MTASCD 'thought leaders' include teachers, parents, pre-service teachers, administrators, trustees, and community service providers.
- **Professional Learning** - MTASCD promotes the conceptual understanding of the whole child tenets and is an active presence impacting implementation of best practices.
- **Collaborative Partnerships** - MTASCD is the bridge between classrooms, administration, school systems, regional organizations, and communities across the state.
- **Advocacy** - MTASCD is the leading authority on whole child topics supporting schools, community and regional organizations.

Scanning the Horizon



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

MTASCD Environmental Scan

Tools to Anticipate Change... *Environmental Scanning*

- Tracking Trends
- SWOT Analysis



MTASCD Macro Environmental Sca



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

Five Key Factors to Consider:

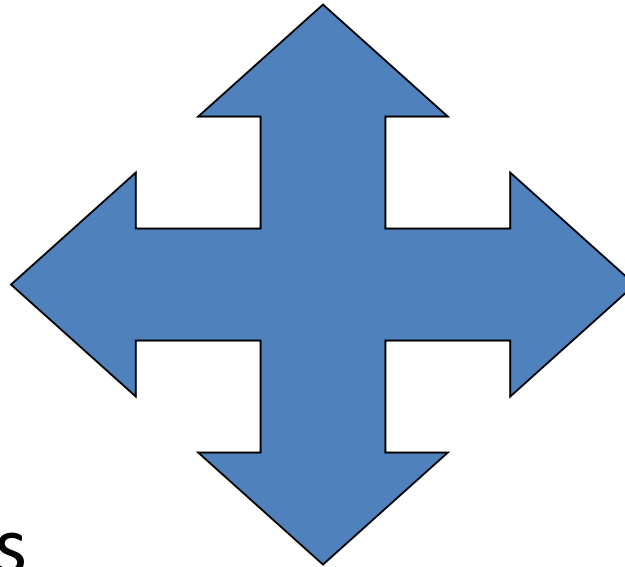
- 1. Demographics**
- 2. Business / Economic Climate**
- 3. Legislation / Regulation**
- 4. Technology / Science**
- 5. Politics / Social Values**

MTASCD SWOT Analysis

Baseline

Strengths

Weaknesses



Opportunities

Threats

Exercise on Conditions, Trends and Assumptions



Estimated Time: 45 minutes

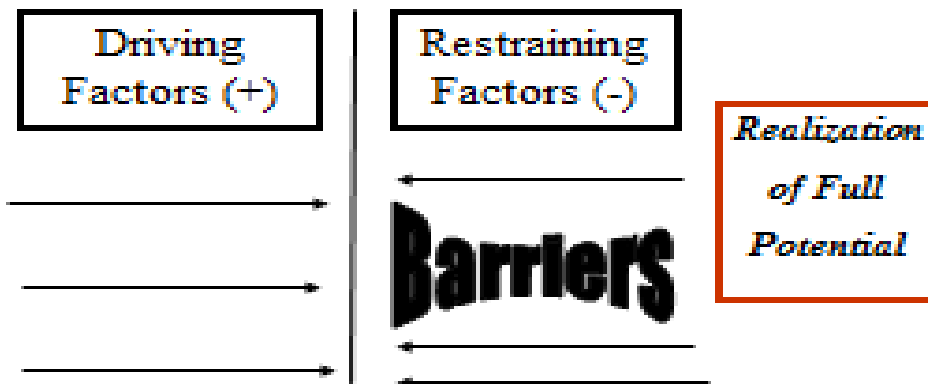
Each of the Groups will record the following:

- Choose Key Factors 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 Environmental Scan on
Current Conditions, Trends and
Assumptions about the Future Document
DRAFT 9-28-17

Exercise on Conditions, Trends and Assumptions - Example



Each Group will report briefly on their Key Factor – Current Conditions, Trends, Assumptions about the Future, Barriers, and Mega Issue Questions

This work will be prepared for
your review and progress!



Thank you MTASCD Strategic
Plan Participants for your work
to strengthen our association
through Strategic Planning on
11-30-17!

MTASCD Strategic Planning 6-19-18



Goals for this Strategic Planning Session

1. Review Strategic Plan Development
2. Review Scan of The Horizon
3. Develop Goals and Strategic Objectives

Thanks in advance for your effort to establish an outstanding Strategic Plan for MTASCD!

The Order of Strategic Planning

Identity First

Core
Purpose
and
Core Values

Who are we?

Direction Second

Big
Audacious Goal

Where are we going ?

Three to Five Year Plan
Goals & Objectives

Activities Third

Strategies
and
Actions

What are we doing?

Who will do what?

Review Strategic Plan Development



The link below is the MTASCD Strategic
Plan progress through 3-1-18

[MTASCD Strategic Plan Development
DRAFT Document 3-1-18](#)

Review Scan of The Horizon



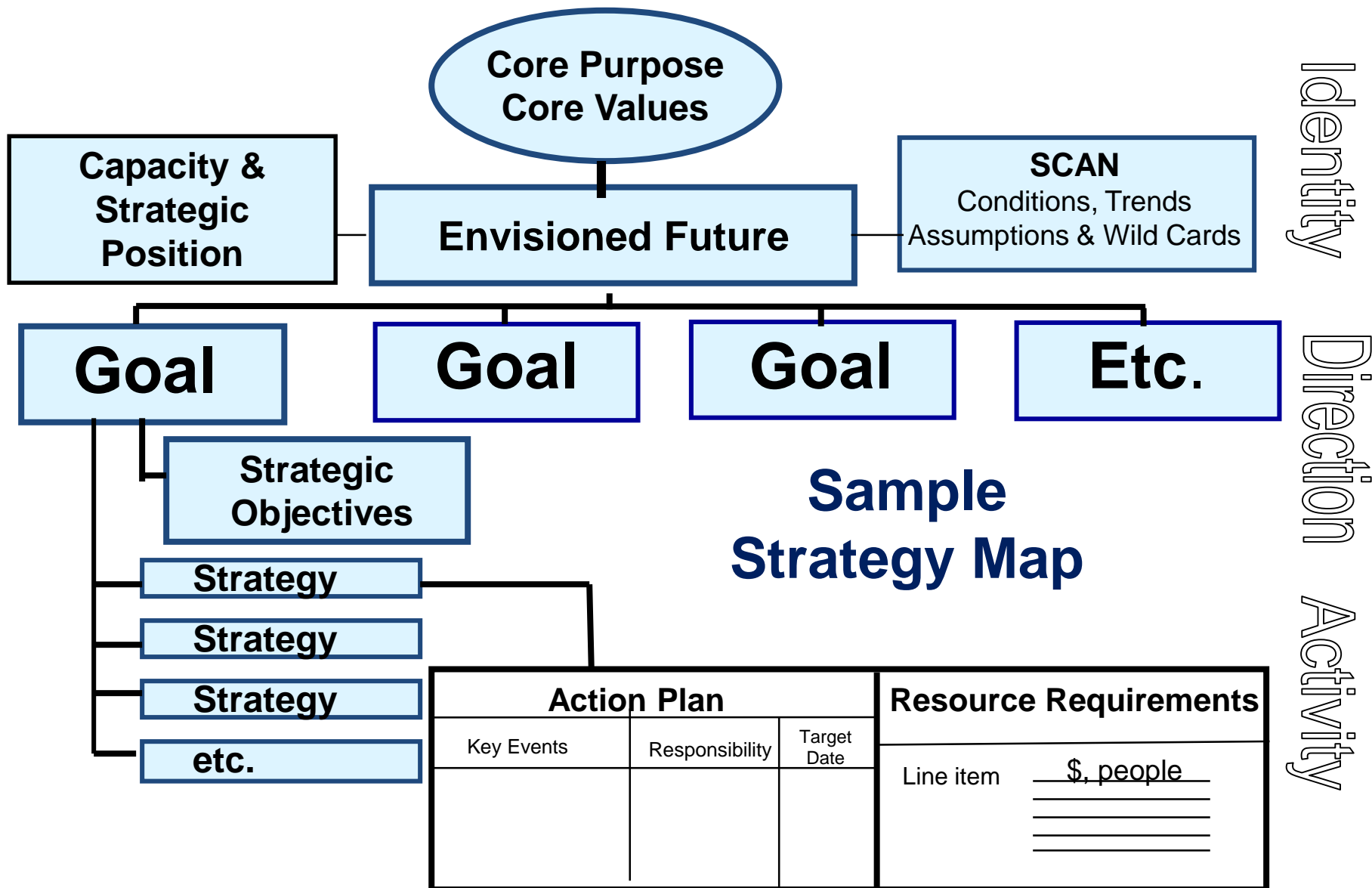
The link below is the MTASCD Scan of the Horizon established 11-30-17 and 3-1-18

[MTASCD Environmental Scan
Worksheet 11-30-17 and 3-1-18](#)

Goals and Strategic Objectives



Developing the MTASCD Goals and Strategic Objectives using Knowledge-Based Decision Making Questions



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 MTASCD Goals

1. To assist all state educational agencies with curriculum and supervision development.
2. To stimulate the participation of professional educators in curriculum work.
3. To encourage local, regional and state research in curriculum and problems.
4. To disseminate curricular materials, and to acquaint professional educational workers with these materials, membership and program of the Association for Supervision and Curriculum Development.
5. To influence legislation that impacts curricular areas.

Exercise on Goals and Strategic Objectives



A possible means to focus goal areas:

1. Curriculum 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. 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!



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



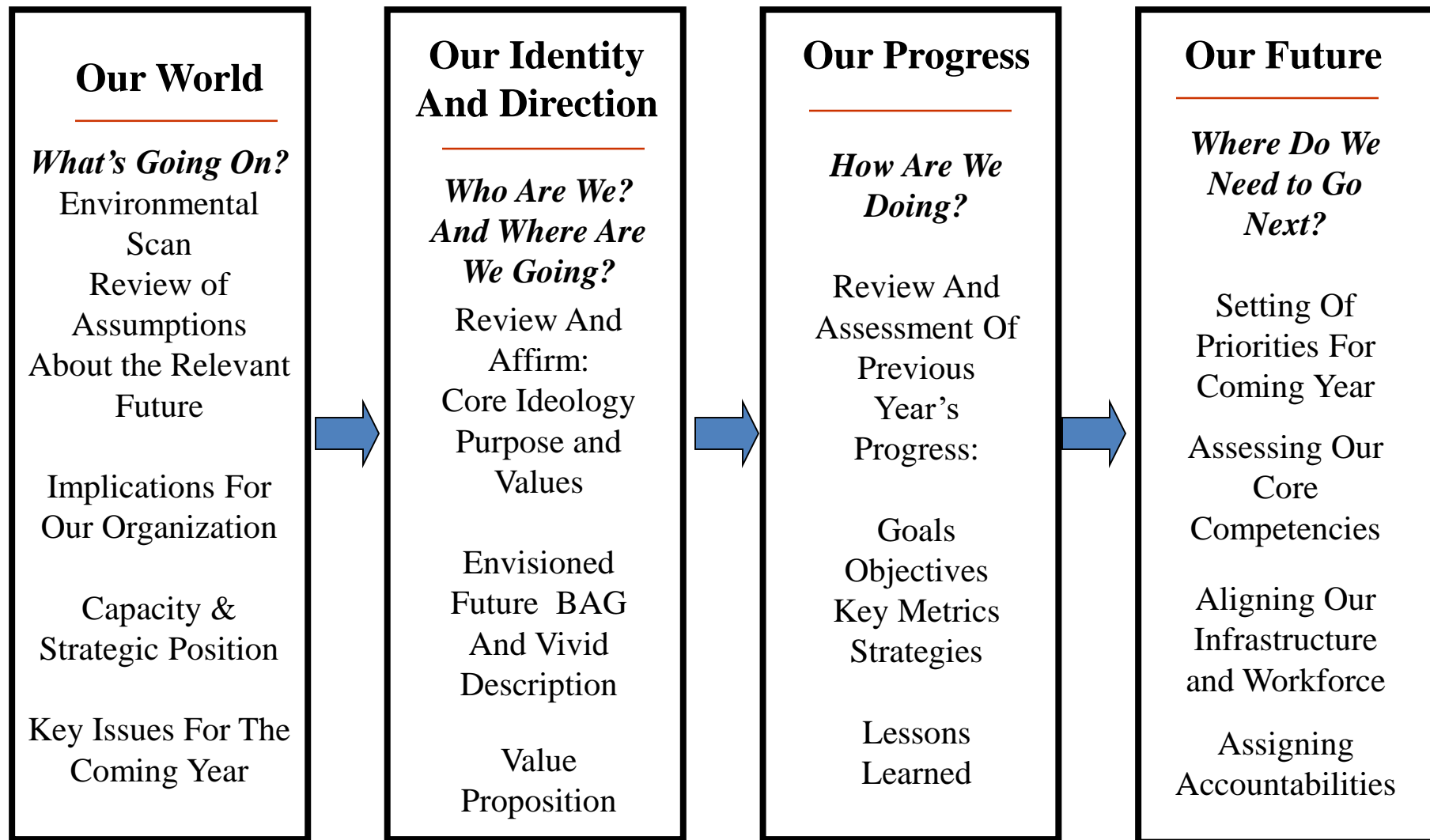
**Discussion of
Mega Issue(s)**

**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 MTASCD Strategic
Plan Participants for your
work to strengthen our
association through
Strategic Planning!