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 ...
“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.”
“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.”
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.
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.
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.
**Five Planning Horizons**

Timeless 30 years 20 10 5 3 2 1 year

- **Envisioned Future**
  - Big Audacious Goal
  - Vivid Description

- **Critical Factors**
  - Scan
    - Conditions, Trends & Assumptions
  - Mega Issues
  - Strategic Principles

- **Strategic Planning**
  - Value Proposition
  - Goals
  - Objectives
  - Strategies
  - Operational Strategy

- **Action Planning**
  - Annual Strategic Plan Review
  - Priority Setting
  - Program Planning
  - Action Planning

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

KNOWLEDGE-BASED Decision-Making
Sample Strategy Map

Core Purpose
Core Values

Envisioned Future

Capacity & Strategic Position

Goal
Goal
Goal
Etc.

Strategic Objectives
Strategy
Strategy
Strategy
etc.

SCAN
Conditions, Trends
Assumptions & Wild Cards

Action Plan

<table>
<thead>
<tr>
<th>Key Events</th>
<th>Responsibility</th>
<th>Target Date</th>
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Resource Requirements

<table>
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<tr>
<th>Line item</th>
<th>$, people</th>
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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
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
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.
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
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
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.

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<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
<th>Core Purpose Criteria</th>
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<tr>
<td>Yes</td>
<td>No</td>
<td>Do you find this purpose personally inspiring?</td>
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<tr>
<td>Yes</td>
<td>No</td>
<td>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.)</td>
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<tr>
<td>Yes</td>
<td>No</td>
<td>Does the purpose help you to decide what activities to not pursue, to eliminate from consideration?</td>
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<tr>
<td>Yes</td>
<td>No</td>
<td>Is this purpose authentic – something true to what the association is all about – not merely words on paper that “sound nice”?</td>
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<tr>
<td>Yes</td>
<td>No</td>
<td>Would this purpose be greeted with enthusiasm rather than cynicism by a broad base of people in our association and education community?</td>
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<tr>
<td>Yes</td>
<td>No</td>
<td>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?</td>
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<tr>
<td>Yes</td>
<td>No</td>
<td>Can you envision this purpose being as valid 100 years from now as it is today?</td>
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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

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<tr>
<th>Yes</th>
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<tr>
<td><strong>If you were to start a new organization, would you build it around this core value <em>regardless</em> of the industry?</strong></td>
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<tr>
<td><strong>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?</strong></td>
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<tr>
<td><strong>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?</strong></td>
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<tr>
<td><strong>Do you believe that those who do not share this core value—those who breach it consistently—simply do not belong in your organization?</strong></td>
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<tr>
<td><strong>Would you personally continue to hold this core value even if you were not rewarded for holding it?</strong></td>
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<td><strong>Would you change jobs before giving up this core value?</strong></td>
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<tr>
<td><strong>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?</strong></td>
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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

- What We Are the Best At
- What We Are Passionate About
- What Drives our Resource Engine

MASSP program Here
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.
  o The Big Audacious Goal must be consistent with the Core Purpose and Core Values previously identified.
  o 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:
  o First and Foremost, the impact association has on children
  o The Most valued Benefits, Products and Services
  o Delivery Systems
  o Governance Structure
  o Culture
  o 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: ____________

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<thead>
<tr>
<th>15 minutes</th>
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<tbody>
<tr>
<td>Current State</td>
<td>Trends</td>
<td>Assumptions</td>
</tr>
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- Driving Factors (+)
- Restraining Factors (-)

Realization of Full Potential

Barriers

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”.

MONTANA MASSP
Exercise on Conditions, Trends and Assumptions - Example

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

Our World
What’s Going On?
Environmental Scan
Review of Assumptions About the Relevant Future
Implications For Our Organization
Capacity & Strategic Position
Key Issues For The Coming Year

Our Identity And Direction
Who Are We? And Where Are We Going?
Review And Affirm: Core Ideology Purpose and Values
Envisioned Future BAG And Vivid Description
Value Proposition

Our Progress
How Are We Doing?
Review And Assessment Of Previous Year’s Progress:
Goals Objectives Key Metrics Strategies
Lessons Learned

Our Future
Where Do We Need to Go Next?
Setting Of Priorities For Coming Year
Assessing Our Core Competencies
Aligning Our Infrastructure and Workforce
Assigning Accountabilities
A Process for Planning and Thinking Strategically

Core Ideology and Envisioned Future
- Core Purpose
- Core Values
- Vision
- Vivid Description

Strategic Planning
- Goals and Objectives
- Prioritization
- Organization Strategy

Program & Operational Planning
- Strategies and Tactics
- Priority Setting & Planning
- Annual Budget Cycle
- Infrastructure Alignment

Current Conditions

Trends

Assumptions About the Future
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

**Budget**
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!