

*Executive Director's Report to the SAM Board of Directors
2nd Quarter 2018-19 Strategic Plan Update
First Update on SAM Strategic Plan 2018-22
January 27, 2019*



The [SAM Strategic Plan](#) webpage outlines the benefits being a SAM member affords each education leader through their contributions to the greater good of the education community to inspire our students. The SAM Board adopted an updated [SAM Strategic Plan 2018-22](#) on 10-18-18. This is the first report of progress on the Strategic Plan Goals ...

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

Noted Progress on Strategic Plan Goals for 2018-22:

- This section of the report is intended to summarize what your SAM office team, the Board collectively & individually, and the association have accomplished from July through the present time, noting that the final report on the SAM Strategic Plan 2014-18 was given at the end of 1st Quarter (September 30, 2018), and this is the first report on the SAM Strategic Plan 2018-22!
- This information is in addition to the SAM Executive Director Updates sent electronically.
- This report is organized around the 3 Goals and Strategic Objective in the Strategic Plan.
- 2nd Quarter updates are added using black text.
- 3rd Quarter updates will be added using green text.
- 4th Quarter updates will be added using purple text.

SAM Goals and Strategic Objectives (Updated 10-18-18)

1. **Leadership Involved in Decisions that Impact Education:** SAM affiliate members modeling and promoting the highest levels of professionalism, integrity and leadership actively engage in impactful discussions on education.

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.
 - 1.1.1 Continued presence in educational conversations including but not limited to MT-PEC, the state legislature, federal activities.
 - SAM consistently requests that our members participate actively in all efforts (committees, task force, study groups, commissions, etc.) impacting the education of children in Montana.
 - SAM's participation with integrity with our education stakeholders in [MT-PEC](#), the Governor's office, State Superintendent's office, Montana University System, Montana Congressional Delegation, and other professional groups and advocacy groups, has provided SAM a seat at the table when discussing important educational issues.

- SAM and affiliates have worked to build relationships with the new State Superintendent and the new team at OPI during the transition of the office following the November election.
 - Significant progress continuing in developing relationships with MUS through the MUS Rural Educator Recruitment and Retention Task Force and the SAM LPLP, MT-PEC in collaborating to develop a Governance Training for district leadership teams, Governor’s office in working on Broadband access for schools, and all advocacy priorities of SAM with Montana legislators and the Montana Congressional delegation.
- 1.1.2 Explore and discern our methods for greater influence and recognize a 365-day calendar for action.
- SAM [Web Calendar](#) lists all of the events and meetings scheduled for SAM and Affiliates.
 - SAM developed the [2018-19 SAM Conference-Meeting Schedule](#) to assist our members
 - SAM developed the [2018-19 SAM and Affiliate Board Meeting Schedule](#) to assist members of the SAM and Affiliate Boards with planning
 - Significant planning for advocacy has been developed and is being implemented for the [2019 Legislative Session](#).
- 1.1.3 SAM takes action to be the “go to” organization for the best information on Montana’s schools and school needs.
- SAM is a leading advocate for Montana administrators through our work with MT-PEC, the Governor’s office, OPI, legislators and our congressional delegation. We are also leaders in the national level discussions of AASA, NAESP and NASSP.
 - Advocacy for education issues are found on the SAM website under the [Advocacy](#) tab and includes [Advocacy Issues 2018-19](#), [2019 Legislative Session](#), and [Federal Issues](#).
 - Professional learning opportunities are found on the SAM website under the Professional Learning tab, providing members with information about past, current and future [conferences](#), and the [SAM Leaders Professional Learning Program](#).
- 1.1.4 Continued development of research based materials for school leaders for use in promoting the strength of Montana schools, school safety, suicide prevention, etc.
- School Safety became a major national issue following the February 14 school shooting at Stoneman Douglas HS in Florida. Practicing integrity, honesty and fairness, SAM coordinated efforts to develop research-based materials for school leaders and pointed our members to those materials. SAM has participated on the Montana Schools Emergency Management Planning (MTSEMP) Advisory Council since its inception in 2015-16. This Council’s work has become front and center around school safety assisting in coordinating access to research-based school safety materials. The School Safety resources are now located on the OPI website [HERE](#).
 - SAM was an active participant in the development of Suicide Prevention and resources now located on the OPI website [HERE](#).
- 1.1.5 Members and staff need to continue to work to ensure fairness, honesty, respect, and courtesy in promoting professional learning and advocacy

- SAM members are cooperating with partners in the development of initiatives, committees, and task force to accomplish education goals.
- SAM members have participated in representing many significant educational issues for the Legislative [Education Interim Committee](#).
- Continued active participation by SAM members on the many Committees, Task Force, and Councils insures that administrators' expertise and voice are part of the decision making process on most all of the education activities impacting the education of Montana students.

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.

1.2.1 Members and staff need to continue to work to ensure fairness, honesty, respect, and courtesy in promoting professional learning and advocacy.

- Setting a shining example of blending the SAM Strategic Plan with advocacy to cultivate a culture of collaboration, alliances and partnerships in the best interest of Montana's children!
- SAM's contributions to the work of the legislative [Interim Education Committee](#), [RISE4MT](#), [MUS Rural Educator Recruitment and Retention Task Force](#), the Zogby poll 2017 and 2018, and production of the [GREAT V](#) and [VI](#) publications are prime examples of creating useful partnerships and tools for our members, keeping fairness, honesty and respect for all involved.
- Focus attention on the value our public schools bring to each community as described in [GREAT VI](#).

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

1.3.1 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.

- SAM Affiliates have established Board Leadership Web Meetings that are scheduled regularly in order to allow Board members to discuss contemporary issues.
- SAM community forums have been established for each affiliate and each affiliate Board in order to communicate contemporary issues impacting each affiliate.

1.3.2 Continue to utilize the SAM Needs assessment to establish priorities for conference themes and meeting agendas.

- The [SAM Needs Assessment 2018 Executive Summary](#) and recently developed [SAM Needs Assessment Data Disaggregated by Affiliate 2018](#) reveals the continuing priorities of SAM members for professional learning and advocacy.
- SAM Needs Assessment 2019 survey was due January 11. [SAM Needs Assessment 2019 Executive Summary](#) and the [SAM Needs Assessment Data Disaggregated by Affiliate 2019](#) provides the opportunity for review of the SAM Board to determine future direction.

1.3.3 Through the SAM Investment and Finance Committee, continue to review the financial well-being of SAM and its affiliates.

- The SAM Investment and Finance Committee is functioning successfully meeting on a quarterly basis to meet the fiduciary responsibility of monitoring SAM and affiliate finances and investments.

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 promote equitable access to quality education for all students through equitable, adequate funding of public schools.

- SAM Advocacy Priorities includes the Support of Adequate and Equitable School Funding.
- SAM Advocacy work in the 2019 Legislative Session continues the focus on both adequacy and equity in funding for our public schools.

2.2 SAM will maintain a united front with MT-PEC (SAM, MTSBA, MASBO, MREA, MFPE, MQEC).

- SAM continues to be a leader in the MT-PEC discussions to focus on the key educational issues.
- SAM has taken a lead role in the RISE4MT recruitment and retention issues insuring that the [Montana Recruitment and Retention Survey Results](#) (and [Summary](#)) were considered in the creation of future steps of RISE4MT included in the [RISE4MT Update 1-9-19](#). This Update was presented to the 2019 Legislature Joint Education Committees on 1-9-19.

2.3 SAM will utilize a Legislative Network for accurate information sharing and two-way communication.

2.3.1 Develop a centralized communications system and spend time with each affiliate to ensure everyone knows how to get on and use.

- The [SAMLN19](#) is fully developed with over 90 members participating the centralized communication system. On 1-3-19 a webinar training was provided for all SAMLN19 members.

2.4 SAM will build capacity of SAM membership to develop effective advocacy strategies.

2.4.1 Create or find a series of advocacy skill-building videos, 3-5 minutes long and distribute to affiliates.

- Three videos were created to assist the SAMLN and were presented during the 1-3-19 training and are readily available for review of all SAM members.
 - [SAMLN19 Resources Video](#)
 - [SAMLN19 Effective Advocacy PowerPoint](#)
 - [SAMLN19 'How to Provide Testimony on a Bill' Video](#)

2.4.2 Create an advocacy strand at MCEL beginning in 2019.

- Will be promoted by SAM with the MCEL partners when planning for MCEL 2019.

2.5 SAM will build Montana specific federal advocacy.

2.5.1 Provide monthly Montana specific advocacy talking points.

- Currently each affiliate national association is providing Federal Relations coordinators with monthly federal updates. At this time the affiliates are deciding how to share with their affiliate members.

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 SAM will provide professional development using social media

3.1.1 Continued involvement in Ed Chats, Ed Camp, technology, and conferences.

- Each SAM and affiliate conference agenda considers the elements identified above as part of the conference.
- SAMEdChats have continued during the 2nd Quarter of 2018-19 with minimal participation.

3.2 SAM will continue development of mentorship opportunities for members through the SAM Leaders Professional Learning Program (LPLP)

3.2.1 Continue tracking new leaders' participation and progress in the SAM Leaders Professional Learning Program formation of the New Leaders Collegial Learning Network (CLN).

- [SAM LPLP 2018-19 Executive Summary Mid Year Report](#) provides specific details of the progress of the 55 SAM LPLP members and 9 Collegial Learning Networks during the first half of 2018-19. This program is meeting the needs of personalized professional learning for about 5% of our SAM members.
- The focus on new leaders and the supports provided to them through the SAM NL CLN continue to be a focus of the LPLP.

3.2.2 Continue SAM Needs Assessment Survey to gain feedback and insight of members' satisfaction and needs.

- [SAM Needs Assessment 2019 Executive Summary](#) and the [SAM Needs Assessment Data Disaggregated by Affiliate 2019](#) provides the opportunity for review of the SAM Board to determine future direction.

3.3 SAM will continue development of membership.

3.3.1 Maintain stability of membership and seek to involve administrators who are not members.

- [SAM Membership 2018-19 2nd Quarter Report](#) shows 1038 SAM members (record of 1058 members in 2017-18 – largest difference is less Affiliate memberships in the current year – 22 vs 31 a year ago).
- Significant strategies have been incorporated to draw members including the implementation of regional affiliate Google sheets of membership that are monitored and the responsibility of affiliate regional directors, targeted work in the shift from MASSP membership to MAEMSP membership, and analysis of positions no longer filled across the state.

3.3.2 Develop consistent vacancy fill information and statistical information across administrative position openings.

- SAM is developing the SAM Annual Administrative Vacancy Report to be used to assist in decision making about recruitment and retention of administrators in Montana. The criteria included in the report have been carefully researched. 2018-19 data is being used to prepare the 1st report. This is expected to be available this spring.

The SAM Strategic Plan 2018-22 was developed and adopted by the SAM Board on October 18, 2018. Goals and Strategic Objectives were revised in the new plan, so this report is the first report on the SAM Strategic Plan 2018-22. Thank you to SAM members for your contributions!

Respectfully submitted,



Kirk J. Miller
Executive Director