

*Executive Director's Report to the SAM Board of Directors  
3rd Quarter 2018-19 Strategic Plan Update  
April 5, 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. Note that the final report on the SAM Strategic Plan 2014-18 was given at the end of 1<sup>st</sup> Quarter (September 30, 2018), and this is the second 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.
- 2<sup>nd</sup> Quarter updates are added using black text.
- 3<sup>rd</sup> Quarter updates are added using green text.
- 4<sup>th</sup> 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.
- SAM assisted OPI in making recommendations for appointments of administrators to the Variance to Standards Review Board.
- During the legislative session, 3<sup>rd</sup> quarter, MT-PEC met regularly to discuss legislation and the impacts of proposed legislation. Meetings with the Governor’s team and the Governor have taken place on a regular basis during 3<sup>rd</sup> quarter to discussion education legislation.
- MASSP and MAEMSP officers met with staff of the MT Congressional delegation at their Advocacy Conference in DC in March.
- SAM office staff have met with the education legislative aide for both Senator Tester and Senator Daines during 3<sup>rd</sup> quarter. We have shared in detail the federal advocacy issues important to SAM as outlined in our SAM Positions, Resolutions, and Priorities.

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](#).
- Legislative session has required the development of a Legislative Schedule by Week of the bills followed by SAM. This rapidly changing schedule required updating 2-3 times per week. This information was used in providing updates to SAM members about progress in the 2019 Legislature. The [2019 Legislative Session](#) link provides the reader with access to numerous communications available to SAM members during the session.
- SAM office has developed the [2019-20 SAM Conference-Meeting Schedule](#) and the [2019-20 SAM and Affiliate Board Meeting Schedule](#) to assist our members with planning for the next school year.

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](#).

- MT-PEC discussions mid-legislative session have included plans to help our members with professional learning to implement the changes potentially created by legislation. This discussion is likely to lead to MT-PEC generated professional learning opportunities for SAM members this spring and summer. SAM's input and expertise in this work is critical to providing opportunities to our members.

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](#).
- SAM Executive Director is involved in the Montana Safe Schools Advisory Council (MASSC), formed during 3<sup>rd</sup> quarter. This Council will oversee actions of the state of Montana to support school safety. The Council is a transition from the former MT School Emergency Management and Planning (MTSEMP) advisory council, which SAM has participated on the past 3 years. The MASSC is facilitated by OPI office staff with Safe School Grant funding.

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.
- During the 2019 legislative session, all SAM efforts have been to ensure fairness, honesty, respect and courtesy in promoting professional learning and advocacy needs of our administrator members. Many of these efforts require diligent, frank, honest information sharing that is sometimes difficult for the parties involved to take, and equally difficult for the parties not directly involved to understand. SAM has represented our Delegate Assembly approved [SAM Position, Resolutions and Priorities](#) with fidelity before, during, and (will do so) after the 2019 legislative session.
- The SAM office experienced a transition during 3<sup>rd</sup> quarter of this year, and the office has worked with fairness and honesty to evaluate the transition plan and make recommendations for SAM operations for 2019-20.

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](#).
- During the 2019 legislative session, all SAM efforts have been to ensure fairness, honesty, respect and courtesy in promoting professional learning and advocacy needs of our administrator members. Many of these efforts require diligent, frank, honest information sharing that is sometimes difficult for the parties involved to take, and equally difficult for the parties not directly involved to understand. SAM has represented our Delegate Assembly approved [SAM Position, Resolutions and Priorities](#) with fidelity before, during, and (will do so) after the 2019 legislative session.
- The SAM office experienced a transition during 3<sup>rd</sup> quarter of this year and has worked with fairness and honesty to evaluate the transition plan and make recommendations for SAM operations for 2019-20.

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.
- 3<sup>rd</sup> quarter shows great use by our members of the SAM community forums and e-lists to communicate ideas and collect input.
- Delegate Assembly activities have been implemented during the legislative session by over 100 SAM members from all affiliates participating in the SAM Legislative Network 2019 (SAMLN19).
- Boards are evaluating Board Leadership Web Meetings and requesting that these meetings continue as scheduled for 2019-20.
- The SAM Update (weekly e-newsletter) and SAM Bulletin continue to provide our members with current, and future focused information about their association and education.

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.
- Contemporary topics from [SAM Needs Assessment](#) – Professional Learning Needs (in order from high to low): *1. Student Mental Health 2. Instructional Strategies 3. School Law/Special Education (tied) 4. Leadership Skills and Practices 5. School Safety* were described at the SAM Executive Board meeting on 3/19/19. A request was made that affiliate presidents work to address these priorities when planning affiliate conferences in the ensuing year.
- Contemporary topics from [SAM Needs Assessment](#) – Support of Adequate and Equitable School Funding was found to be most important; Support of Capital Facilities/Technology Infrastructure Needs and Opposition to School Privatization/Profitization Efforts were tied for the least important were discussed at the SAM Executive Board meeting on 3/19/19. The Executive Board reviewed how the priorities fit with SAM’s Delegate Assembly approved Advocacy Positions, Resolutions and Priorities.

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.
- [SAM Investment and Finance Committee \(SAM Executive Board\)](#) have reviewed and approved a recommendation for SAM office organization and staffing 2019-20 that will be acted upon by the SAM Board at the 4/5/19 meeting. This recommendation is intended to solidify the financial well-being of SAM and its affiliates into the future.

**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.
- [SAM](#) has represented our Delegate Assembly approved [SAM Position, Resolutions and Priorities](#) with fidelity before, during, and (will do so) after the 2019 legislative session.

- Legislative session communication tools were developed prior to the legislative session. The [2019 Legislative Session](#) link provides the reader with access to numerous communications available to SAM members during the session, including weekly updates and podcasts.

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.
- SAM's effort to collaborate with the MT-PEC partners have been a decisive element in the success of legislation early in the session and continuing as the session draws to a close.
- During the 2019 legislative session, all SAM efforts with MT-PEC have been to ensure fairness, honesty, respect and courtesy in promoting professional learning and advocacy needs of our administrator members. Many of these efforts require diligent, frank, honest information sharing that is sometimes difficult for the parties involved to take, and equally difficult for the parties not directly involved to understand. SAM has represented our Delegate Assembly approved [SAM Position, Resolutions and Priorities](#) with fidelity before, during, and (will do so) after the 2019 legislative session and that has garnered support from the MT-PEC on many key policy and funding issues.

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.
- The [SAMLN19](#) has operated with fidelity and tenacity through the legislative session. The tools to successfully participate as a member of the SAMLN19 are web-based and have been heavily utilized by the over 100 SAMLN members.
- Weekly updates and podcasts, legislative weekly schedules, and Calls to Action have been the methods of communication that appear to be successful in our SAMLN19 work during the session.

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](#)
- SAMLN19 Webinar training that occurred on 1/3/19 was [recorded](#) allowing all SAMLN19 members to review the training materials and strategies any time.

- Legislative updates have been provided on the [SAMLN19](#) web page using web-based documents weekly and a podcast for each Update has been provided to meet the needs of busy administrators interested in keeping up with SAM advocacy during the legislative session. Check out [SAMLN19 Legislative Update Week 13 3-29-19](#) and [Podcast Week 13](#) as an example.

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.
- Montana SAM affiliates are able to reference the [SAM Federal Advocacy Priorities 2018-19](#) for use when working with the federal congressional delegation on federal advocacy issues. This one page reference was developed from SAM Resolutions related to federal education issues.
- Federal advocacy information is available to all SAM members on the [Federal Issues Followed by SAM](#) webpage

**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 2<sup>nd</sup> Quarter of 2018-19 with minimal participation.
- SAM offered SAMEdChats in February and no attendees participated. We have not offered a SAMEdChat in March because of lack of involvement in wanting this to continue. The SAM office will take direction from the Board going forward with SAMEdChats.
- Ed Camp strategies were implemented during the MASS Spring Conference (as Class Size Caucus discussions) and at the METAtchED 2019 Conference. Both resulted in engaging dialogue around the most important contemporary topics.

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.
- [SAM LPLP Data Collection and Provider Quarterly Reflection 3<sup>rd</sup> Quarter](#) reports are reviewed to provide insight into the progress of supports provided to new leaders through the SAM LPLP.
- The SAM LPLP Aspiring Superintendents CLN is functioning in concert with the curriculum and lead mentorship of AASA. SAM LPLP Providers have been the significant contact for the members of the AS CLN and it appears that progress is being made by all members in the CLN.
- The SAM LPLP New Leaders CLN has relied mainly on the individual contacts between members of the CLN and their provider. The data collection for 3<sup>rd</sup> quarter describes progress of our members in the NL CLN.

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.
- Contemporary topics from [SAM Needs Assessment](#) – Professional Learning Needs (in order from high to low): *1. Student Mental Health 2. Instructional Strategies 3. School Law/Special Education (tied) 4. Leadership Skills and Practices 5. School Safety* were described at the SAM Executive Board meeting on 3/19/19. A request was made for affiliate presidents work to address these priorities when planning affiliate conferences in the ensuing year.
- Contemporary topics from [SAM Needs Assessment](#) – Support of Adequate and Equitable School Funding was found to be most important; Support of Capital Facilities/Technology Infrastructure Needs and Opposition to School Privatization/Profitization Efforts were tied for the least important were discussed at the SAM Executive Board meeting on 3/19/19. The Executive Board reviewed how the priorities fit with SAM's Delegate Assembly approved Advocacy Positions, Resolutions and Priorities.

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 2<sup>nd</sup> 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.
- [SAM Membership 2018-19 3<sup>rd</sup> Quarter Report](#) shows 1046 SAM members. This is 11 members less than 2017-18 3<sup>rd</sup> quarter. We currently have some outstanding Affiliate memberships that have not come in during 3<sup>rd</sup> quarter.



- Extensive preparation for the April 3 launch of the 2019-20 membership drive led to a deep review of memberships and transmittals to national associations. We are working on reconciling this important membership process. The 2019-20 membership drive launched on April 3. Many membership requests came back on the first day of the drive.
- 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 1<sup>st</sup> report. This is expected to be available this spring.
  - Data collected on vacancy fill results for 2018-19 is in development. Tools for collecting the right data for 2019-20 vacancy fills are in place and the data collection is underway.

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. This is the second report on the SAM Strategic Plan 2018-22. Thank you to all SAM members for your attention to the Strategic Plan!

Respectfully submitted,



Kirk J. Miller  
Executive Director