

Executive Director's Report to the SAM Board of Directors
3rd Quarter 2021-22 Strategic Plan Update
March 22, 2022



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 3rd Quarter 2021-22 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.
- This information is in addition to the SAM Executive Director Updates sent electronically.
- This report is organized around the 3 Goals and Strategic Objectives in the Strategic Plan.
- 1st Quarter updates are added using black text.
- 2nd Quarter updates are added using green text.
- 3rd Quarter updates are added using blue text.
- 4th Quarter updates are added using purple text.

SAM Goals and Strategic Objectives

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 continues 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 continues extensive efforts to streamline the information flow and advocacy efforts related to COVID-19 impact our the education of our children through the [SAM COVID-19 Information for Schools](#) webpage (a web-based blog of pandemic contemporary issues through the lens of an administrator).
- SAM communicated effectively with all partners, state officials and legislators during the 2021 legislative session and continues into the 2021-22 legislative interim ([Interim 2021-22 Legislative Committees](#)). [SAM 2021 Advocacy Priorities, Positions and Resolutions](#) were approved by the SAM Delegate Assembly and will be considered by the SAM membership at the SAM Annual Business Web Meeting on October 22, 2021.
- During 1st quarter, SAM has continued representation of issues openly, honestly and in a fair manner at Interim Committees, with legislators, with MT-PEC, with the Governor's office, DPHHS, DEQ and other administrative branches like the legislative services and fiscal divisions.
- [SAM strategy for promoting the value your school brings to the community](#) was developed by SAM leadership and implemented by the SAM executive director during the 1st Quarter.
- Continued topics of importance were the implementation of [Protecting online student information](#), [DPHHS rules](#) on healthy learning environments in schools, Educator [Recruitment and Retention](#) issues, and a variety of [federal issues](#).
- SAM members have participated in the review of [Chapter 57](#) (Educator Licensure) and [Chapter 58](#) (Professional Educator Preparation) administrative rule Task Force and Feedback Group. SAM members have continued representation of issues openly, honestly and in a fair manner.
- [During 2nd Quarter the SAM Strategy – Promote the Value Your School Brings to the Community](#) was developed as a webpage to keep SAM members informed about the many climate and culture changes in our communities and the impact on schools.
- SAM executive director and SAM members participated heavily in completing the work of the [Chapter 57](#) and [Chapter 58](#) Task Forces and the efforts to propose ARM revisions to CSPAC and the Board of Public Education.
- During 2nd quarter, SAM has continued representation of issues openly, honestly and in a fair manner at Interim Committees, with legislators, with MT-PEC, with the Governor's office, DPHHS, DEQ and other administrative branches like the legislative services and fiscal divisions.
- During 3rd quarter, SAM has continued representation of all issues openly, honestly and in a fair manner with all stakeholders – interim committees, legislators, MT-PEC, Governor's office, OPI, DPHHS, DEQ and other administrative branches like the Department of Labor and Industry, legislative services and fiscal divisions.
- SAM members had a seat at the table in the K-12 Vision Project 2022 planning session on March 10, 2022. SAM members represented the ongoing vision and goals for the K-12 public education system in an open, honest and fair manner.

1.1.2 Explore and discern our methods for greater influence and recognize a 365-day calendar for action.

- [SAM Web Calendar](#) , [2021-22 SAM Conference-Meeting Schedule](#) , [2021-22 SAM and Affiliate Board Meeting Schedule](#) are developed to recognize the action calendar for SAM and all affiliates.
- Use of [SAM Update](#) and [SAM Bulletin](#) to report on actionable items.

- The COVID-19 pandemic impact on our communities and schools requires attention to revision of the calendar of meetings, professional learning and conferences organized by SAM and affiliates.
- SAM developed the succession planning process for the Executive Director position and SAM office staffing for the future 2022-23 and beyond.
- SAM professional team continues to assist all six SAM affiliate associations accomplish their core purpose and goals. Serving six association boards of directors and 85 board members whose leadership impacts the education of all Montana children.
- [SAM Succession Plan 2021-22](#) is being accomplished following a timeline developed in September 2021 and continuing through the end of the 2022 calendar year.
- [Draft 2022-23 SAM and Affiliate Board Meeting Schedule](#) and [2022-23 SAM Conference – Meeting Schedule](#) are under development.

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, NASSP, CASE, and CoSN.
- SAM Advocacy for education issues are uploaded on the [SAM Advocacy Issues](#) webpage and includes Advocacy Issues 2021-22.
- Professional learning opportunities are found on the SAM [Professional Learning](#) webpage, providing members with information about past, current and future [conferences](#), and the [SAM Leaders Professional Learning Program](#).
- SAM is a leader in the discussions to create the MT-PEC generated resources and guidelines to support professional learning and advocacy.
- The COVID-19 pandemic impact on our communities and schools required action on behalf of SAM to develop a [SAM COVID-19 Information for Schools](#) webpage providing streamlined information for administrators to reference.
- [During 2nd Quarter the SAM Strategy – Promote the Value Your School Brings to the Community](#) was established as a source of information during the tumultuous times communities are experiencing in today’s pandemic, politically driven environment.
- COVID-19 Information for Schools has appropriately been referred to the state office of public instruction for technical assistance on multiple, varied issues where the federal resources were allocated (OPI) to provide such technical assistance. SAM advocacy has worked to assist the OPI in taking responsibility for this body of work so that technical assistance is available to administrators during the pandemic.
- [During 3rd Quarter the SAM Strategy – Promote the Value Your School Brings to the Community](#) webpage continues to be a source of information during the tumultuous times communities are experiencing in today’s pandemic, politically driven environment.
- [During 3rd Quarter the a SAM COVID-19 Information for Schools](#) webpage has continued providing streamlined information for administrators to reference.

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.

- [SAM strategy for promoting the value your school brings to the community](#) was developed by SAM leadership and implemented by the SAM executive director during the 1st Quarter.
- 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 School Safety Advisory Council (MASSC). 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 5 years. The MASSC is facilitated by OPI office staff with Safe School Grant funding. SAM Executive Director also serves on the board of directors for the Montana Safe Schools Center located at the University of Montana.
- Student data privacy is being addressed as a META project in collaboration with OPI and MTSBA. [META Launches Student Privacy Alliance](#) - Click [HERE](#) to access the resources. [MTSPA](#) (Montana Student Privacy Alliance website).
- SAM is involved in conversations about interoperability standards for digital platforms that will insure student data security and school safety.
- SAM worked with MT-PEC to prepare [MT-PEC 2021-22 COVID FAQ](#) intended to provide school districts with broad guidance on a number of contemporary issues school district leaders are facing with the startup of the school year. There are questions addressing face coverings/masks, vaccinations and testing, quarantine or isolation, reporting positive COVID-19 cases, immunity legislation, trespass legislation, declaration of emergency and emergency policies, and parental rights legislations.
- SAM is preparing the useful recruitment and retention of quality educator research documents to assist our profession with this critical issue. [Montana District/School Leadership Staffing Report 2021-22](#) and [2021-22 SAM Administrative Vacancy Report Executive Summary](#) are to be used for advocacy and factual information related to the recruitment and retention of quality educators for Montana schools.
- SAM is assisting the OPI, OCHE, Governor's office, and other education stakeholders with professional development through the SAM Leaders Professional Learning Program with contemporary information as outlined in the [SAM LPLP Mid-Year Executive Summary 2021-22](#).
- [SAM Needs Assessment Survey Executive Summary 2022](#) and [SAM Needs Assessment Data Disaggregated by Affiliate 2022](#) results will be used to assist in decisions for professional learning, advocacy and ensuring leadership has input into decisions impacting the education of Montana's children.
- SAM has continued participate on the Montana School Safety Advisory Committee (MSSAC) through the SAM Executive Director continued attendance at meetings since inception of the Committee in August 2016. The scope of the Committee encompasses all hazards including school safety and suicide prevention. The SAM Executive Director also sits on the Montana Safe Schools Center Advisory Council since inception in 2019. The Montana Safe Schools Center is a research and implementation center for safe school practices and is located on the campus of the University of Montana. SAM has effectively provided input into strategies for prevention, intervention and long-range planning for all elements related to school safety and safe, healthy learning environments for Montana's K-12 school students.

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 promoted fairness, honesty and respect on all efforts during the [2021 Legislative Session](#) and [SAM COVID-19 Information for Schools](#) development by engaging many stakeholders and being at the table when decisions were made. That same effort continues into the 2021-22 legislative interim.
- On all items listed in 1.1.1 – 1.1.4, SAM members have acted with fairness, honesty, respect, and courtesy in promoting professional learning and advocacy.
- The COVID-19 pandemic impact on our communities and schools required action on behalf of SAM to collaborate with fairness, honesty, respect and courtesy with MT-PEC, state and federal leaders and legislators, and the SAM membership.
- SAM has effectively addressed necessary federal and state advocacy issues related to COVID-19 and its impact on our schools.
- **During 2nd quarter, all efforts of SAM to ensure fairness, honesty, respect, and courtesy to promote professional learning, advocacy and the value schools bring to the community.**
- **During 3rd quarter, SAM has continued representation of all issues openly, honestly and in a fair manner with all stakeholders – interim committees, legislators, MT-PEC, Governor’s office, OPI, DPHHS, DEQ and other administrative branches like the Department of Labor and Industry, legislative services and fiscal divisions to promote professional learning, advocacy, and the value schools bring to the community.**

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 strategy for promoting the value your school brings to the community](#) was developed by SAM leadership and implemented by the SAM executive director during the 1st Quarter. The strategy is intended to address fairness, honesty, respect and courtesy for schools in our communities.
- Focus attention on the value our public schools bring to each community as described in GREAT IX 2021. The Zogby poll 2021, and production of the GREAT IX publication (released at MCEL 2021) are prime examples of creating useful partnerships and tools for our members, keeping fairness, honesty and respect for all involved.
- SAM has initiated work in the 2021-22 legislative interim ([Interim 2021-22 Legislative Committees](#)).
- SAM Delegate Assembly 2021 held on June 11, approved the [SAM Delegate Assembly 2021 Business Meeting Recommendations 10-22-20](#) for consideration of the membership at the SAM Annual Business Web meeting on October 22, 2021.
- The COVID-19 pandemic impact on our communities and schools required action on behalf of SAM to collaborate with fairness, honesty, respect and courtesy with MT-PEC, state and federal leaders and legislators, and the SAM membership.

- SAM members serving on efforts to provide guidance for the COVID-19 issues impacting schools have acted with fairness, honesty, respect and courtesy with all audiences and stakeholders.
- During 2nd Quarter the [SAM Strategy – Promote the Value Your School Brings to the Community](#) was established as a source of information during the tumultuous times communities are experiencing in today’s pandemic, politically driven environment. Resources for the use of SAM member are outlined.
- [GREAT 2021 Vol IX](#) was released by the MT-PEC partners at MCEL 2021 in October.
- During 3rd Quarter the [SAM Strategy – Promote the Value Your School Brings to the Community](#) webpage continues to be a source of information during the tumultuous times communities are experiencing in today’s pandemic, politically driven environment.

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 regularly scheduled Board Leadership Web Meetings in order to allow Board members to discuss contemporary issues.
 - SAM Affiliate associations have established ongoing, regular regional web meetings to facilitate great dialogue about all issues related to COVID-19 implementation in our schools. This regional perspective has been extremely valuable for all affiliates and members in establishing direction for real time efforts in COVID-19 protections for our schools.
 - SAM community forums have been established for each affiliate and each affiliate Board in order to communicate contemporary issues impacting each affiliate.
 - SAM communications – [SAM Update](#), [SAM Bulletin](#), [SAM website](#), [Delegate Assembly](#) webpage have been used to actively support SAM activities, meetings and events in communicating evolving perspectives to SAM members.
 - During 2nd quarter all SAM communications tools are being utilized to communicate effectively with all stakeholders and audiences.
 - During 3rd Quarter, the [SAM Call for Delegate Assembly Positions Resolutions 2022](#) was distributed to SAM membership on February 16, 2022 - request of all SAM members to submit Positions and/or Resolutions to be considered by SAM Delegate Assembly 2022. Deadline for submitting is April 29, 2022.
 - 10 SAM members participated in the K-12 Vision Project strategic planning work on March 10, 2022.
 - SAM members have participated in both Task Force and Feedback Groups for the review of Administrative Rules (ARM) in [Chapter 57](#) (Educator Licensure), [Chapter 58](#) (Professional Educator Preparation Program Standards) and the recently begun [Chapter 55](#) (Accreditation Standards).

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

- [SAM Needs Assessment 2021 Executive Summary](#) and the [SAM Needs Assessment Data Disaggregated by Affiliate 2021](#) provides recommendations for future professional learning, advocacy, and services.
- SAM Needs Assessment results will be used in the planning of professional development and advocacy opportunities for the 2021-22 school year.
- SAM Needs Assessment results was used in the development and planning of the [SAM Administrators Institute 2021](#), July 26-27.
- [SAM Needs Assessment 2022 results will be used to assist in decisions for professional learning, advocacy and ensuring leadership has input into decisions impacting the education of Montana's children.](#)
- [SAM Needs Assessment Executive Summary 2022](#) and [SAM Needs Assessment Data Disaggregated by Affiliate 2022](#) reports were completed 1/20/22. The data will be used in assisting with decisions for professional learning, advocacy, and ensuring leadership has input into decisions impacting the education of Montana's children.
- [SAM Needs Assessment 2022](#) results have been used to establish the professional learning opportunities offered during the [2022 MASS/META/MCASE Spring Conference](#).
- [SAM Needs Assessment 2022](#) results coupled with the [2021-22 SAM LPLP Mid Year Data Collection](#) were synthesized allowing the development of the top ten professional learning needs for administrators serving Montana's schools. This top 10 list with descriptions was provided to OPI by requests of Deputy Superintendent, Sharyl Allen, to assist OPI with statewide professional development offerings in the coming year.

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/Finance Committee continues to meet quarterly and serve as ten nexus between policy development and fiscal accountability to meet the goals of SAM.](#)
- The diligence of the SAM Investment/Finance Committee over the past 3 years to establish a stable, growing fiscal outlook for SAM was key to development and implementation of the [SAM Succession Plan 2021-22](#). The Succession Plan implementation will be completed in March 2022 with adequate fiscal resources to accomplish the recommendations outlined in the plan.

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 2021 Legislative Session focused on both adequacy and equity in funding for our public schools. The passage of [HB 15](#) (Implement K-12 Inflation) in February 2021 reveals the ongoing prioritization of school funding.
- SAM Delegate Assembly 2021 held on June 11, approved the [SAM Delegate Assembly 2021 Business Meeting Recommendations 10-22-20](#) for consideration of the membership at the SAM Annual Business Web meeting on October 22, 2021. SAM Delegate Assembly has effectively addressed necessary federal and state advocacy issues related to COVID-19 and its impact on our schools.
- The [COVID-19 Information for Schools](#) webpage resources are updated regularly. The resources are filtered to be valuable for administrators. This webpage provides detailed information on the ESSER II and ESSER III federal funding for schools related to the CARES II and American Rescue Plan Act.
- [SAM COVID-19 Information for Schools](#) has continued to serve as a resource to determine the impact the federal funding for ESSER I, ESSER II and ESSER III are having on schools.
- SAM membership approved the [SAM 2021 Advocacy Priorities Position Resolutions](#) at the annual meeting on October 22, 2021.
- [SAM COVID-19 Information for Schools](#) has continued to serve as a resource to determine the impact the federal funding for ESSER I, ESSER II and ESSER III are having on schools.
- [SAM Delegate Assembly 2022](#) webpage provides information in preparation for the SAM Delegate Assembly 2022, scheduled for June 9-10 in Helena at the Best Western Premier Great Northern Hotel. [SAM Call for Delegate Assembly Positions Resolutions 2022](#) distributed to SAM membership on February 12, 2022 - request of all SAM members to submit Positions and/or Resolutions to be considered by SAM Delegate Assembly 2022. Deadline for submitting is April 29, 2022.

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, see the update on the [Recruitment and Retention of Quality Educators](#) webpage. See also the [OPI Educator Recruitment and Retention webpage](#).
- See [2020-21 SAM Annual Administrative Vacancy Report Executive Summary](#) for the most comprehensive information on Administrator recruitment and retention.
- SAM and member administrators participated in the [K-12 Vision Group](#) Strategic Planning session, September 16, 2020 resulting in a revised, adopted Strategic Plan. The next K-12 Vision Group meeting is planned for January 2022.
- Student data privacy is being addressed as a META project in collaboration with OPI and MTSBA. [META Launches Student Privacy Alliance](#) - Click [HERE](#) to access the resources. [MTSPA](#) (Montana Student Privacy Alliance website).
- Continued participation of SAM and MT-PEC on implementation plans for the [DPHHS rules](#) on healthy learning environments in schools.
- SAM worked with MT-PEC to prepare [MT-PEC 2021-22 COVID FAQ](#) intended to provide school districts with broad guidance on a number of contemporary issues school district leaders are facing with the startup of the school year. There are questions addressing face coverings/masks, vaccinations and testing, quarantine or isolation, reporting positive COVID-19 cases, immunity legislation, trespass legislation, declaration of emergency and emergency policies, and parental rights legislations.

- The COVID-19 pandemic impact on our communities and schools required action on behalf of SAM to develop a [SAM COVID-19 Information for Schools](#) webpage providing streamlined information for administrators to reference.
- The COVID-19 pandemic impact on our communities and schools required action on behalf of SAM to collaborate with MT-PEC to develop the [MT-PEC COVID-19](#) webpage, and work with OPI to develop the [OPI COVID-19](#) webpage for reference of school governance teams who are implementing strategies for our schools during school closure and off site delivery of education services.
- Ongoing collaborative work of SAM and the MT-PEC continues, developing professional learning to engage our members in the flexibility and resources that were developed through bills passed in the 2021 Legislative Session. Reference [MT-PEC 2021 Legislative Session Summaries – Bills Passed Impacting Education](#) and [Recording](#) of the MT-PEC After Advocacy Virtual Event on 5-24-21. This information was presented at the [SAM AI 2021 Conference](#) on 7-26-21 and will be addressed once again at [MCEL Virtual 2021](#) on 10-20-21.
- SAM, through the executive director, continues to participate regularly with MT-PEC on strategies and resources that support the work of administrators and the education of Montana children.
- Technical assistance is provided on legislation developed (much of it focused on what came from the 2021 legislative session) through the work of MT-PEC.
- MT-PEC partner openings for MQEC (Dianne Burke) and MASBO (Denise Williams) with the Executive Directors moving to different jobs. The process for selecting new Executive Directors is underway.
- SAM members (10) participated on March 10 in the K-12 Vision Project strategic plan review and renewal meeting. The intention being to refresh this strategic plan for the vision of K-12 public schools in Montana in preparation for the 2023 legislative session.
- MT-PEC partners Amanda Curtis (MFPE), Dennis Parman (MREA) and Kirk Miller (SAM) presented on panel at the request of the Board of Public Education to review the process and recommendations for Chapter 57 ARM (Educator Licensure administrative rules) on Friday 3/11/22. The partners promoted the [MT-PEC Statement on Ch 57 Rules Final 2.10.22](#) that has been submitted to the BPE at the public hearing on recommendations of the Superintendent of Public Instruction.
- MT-PEC partners Lance Melton (MTSBA), Amanda Curtis (MFPE), Dennis Parman (MREA) and Kirk Miller (SAM) presented a panel presentation “Providing Opportunities for our Children’s Education” on Tuesday 3/22/22 at the [2022 MASS/META/MCASE Spring Conference](#).
- MT-PEC partners continue to work together on the politically charged matters in front of the Board of Public Education – revisions to the Montana Educator Code of Ethics and recommendations for revisions to the educator licensing administrative rules in ARM Chapter 57.
- MT-PEC partners are actively meeting to develop a consensus on goals and objectives to be accomplished in the 2023 legislative session.

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 SAM Legislative Network 2021 (SAMLN21) was formed prior to the legislative session in order to effectively communicate SAM legislative issues/bills and collect

input to allow appropriate representation of SAM issues/bills during the legislative session. [Seventy-five SAM members](#) representing every affiliate region across the state served on the SAMLN21, and through their effort accomplished the successes this session! The [SAMLN21](#) webpage references 18 SAMLN21 Lunch and Legislate Zoom calls and recordings that took place on Monday's at noon throughout the session. The SAMLN21 actively engaged in 8 "Calls to Action", with 7 of the 8 "Calls to Action" resulting in the action requested. This is great evidence of the impact of SAM "boots on the ground" advocacy during the 2021 legislative session.

- The [SAM 2021 Legislative Session webpage](#) is updated with all information about the 67th Legislative session for effective two-way sharing.
- The COVID-19 pandemic impact on our communities and schools required action on behalf of SAM to use the process for developing advocacy positions on federal issues similar to the actions of the Legislative Network during a legislative session. The SAM Delegate Assembly Steering Committee and Affiliate Federal Relations Coordinators review advocacy requests due to COVID-19 and establish action positions on the requests.
- SAM Delegate Assembly 2021 held on June 11, approved the [SAM Delegate Assembly 2021 Business Meeting Recommendations 10-22-20](#) for consideration of the membership at the SAM Annual Business Web meeting on October 22, 2021. SAM Delegate Assembly has effectively addressed necessary federal and state advocacy issues related to COVID-19 and its impact on our schools.
- SAM has initiated work in the 2021-22 legislative interim ([Interim 2021-22 Legislative Committees](#)) considering continued 2-way communications.
- [Work during the Interim 2021-22 utilizes the SAM Delegate Assembly Steering Committee and SAM Legislative Network to strategize on the implementation of 2021 legislation.](#)
- [The details for forming a strong SAMLN23 are underway in preparation for the SAM Delegate Assembly 2022. Promoting with the SAM membership, the need to join the SAMLN23, is underway.](#)

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.

- A virtual training for the 2021 Legislative Session was created and delivered to members of the SAMLN21. See the [SAMLN21](#) webpage for all resources.
- SAMLN21 Webinar training that occurred on 12-29-20 was [recorded](#) allowing all SAMLN21 members to review the training materials and strategies any time.
- Resources were created to assist the SAMLN during the 67th Legislative Session, mainly changes to protocols due to COVID-19, and were presented during the 12-29-20 training and are readily available for review of all SAM members.
 - [SAMLN21 Effective Advocacy presentation](#) (Powerpoint)
 - [Lobbying in the 2021 Legislative Session](#) (Notes)
 - [Public Participation in the 67th Legislative Session](#) (changes to protocols due to COVID-19)
- [Ongoing work to create advocacy resources that are easy to use has continued during 2nd quarter.](#)

- Development of a webpage for housing all of the training and advocacy skill-building resources is underway.

2.4.2 Create an advocacy strand at MCEL beginning in 2019.

- Reference [MT-PEC 2021 Legislative Session Summaries – Bills Passed Impacting Education](#) and [Recording](#) of the MT-PEC After Advocacy Virtual Event on 5-24-21. This information was presented at the [SAM AI 2021 Conference](#) on 7-26-21 and will be addressed once again at [MCEL Virtual 2021](#) on 10-20-21
- At MCEL 2021, on 10-20-21, delivered virtually, the MT-PEC partners of MCEL will hold a pre-conference session [Understanding Outcomes and Making Them Work for Montana’s Students](#).
- MCEL 2021 had a fully developed advocacy strand that was delivered by the MT-PEC partners who are the MCEL partners. The Opening General Session at MCEL 2021 was a look at promoting the value your school brings to the community and used the [GREAT 2021 Vol IX](#) for a resource guide for all education leaders.
- MT-PEC partners Amanda Curtis (MFPE), Dennis Parman (MREA) and Kirk Miller (SAM) presented on panel at the request of the Board of Public Education to review the process and recommendations for Chapter 57 ARM (Educator Licensure administrative rules) on Friday 3/11/22. The partners promoted the [MT-PEC Statement on Ch 57 Rules Final 2.10.22](#) that has been submitted to the BPE at the public hearing on recommendations of the Superintendent of Public Instruction.
- MT-PEC partners Lance Melton (MTSBA), Amanda Curtis (MFPE), Dennis Parman (MREA) and Kirk Miller (SAM) presented a panel presentation “Providing Opportunities for our Children’s Education” on Tuesday 3/22/22 at the [2022 MASS/META/MCASE Spring Conference](#).

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. The affiliates decide how to share with their affiliate members.
- Federal issues important to Montana are updated regularly on the [SAM Federal Issues](#) webpage
- Montana SAM affiliates are able to reference the [SAM Federal Advocacy Priorities 2020-21](#) 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.
- The SAM Federal Advocacy Priorities 2021-22 are included in the [SAM Delegate Assembly 2021 Business Meeting Recommendations 10-21-21](#).
- The COVID-19 pandemic impact on our communities and schools required action on behalf of SAM to use the process for developing advocacy positions on federal issues similar to the actions of the Legislative Network during a legislative session. The issues are described on the [Federal Issues](#) webpage.
- The [SAM COVID-19 Information for Schools](#) webpage is updated regularly with a lens of being valuable for administrators.
- [SAM COVID-19 Information for Schools](#) has continued to serve as a resource to determine the impact the federal funding for ESSER I, ESSER II and ESSER III are having on schools.

- [SAM Federal Issues](#) webpage continues to be updated regularly to provide contemporary resources on federal matters.
- [SAM Federal Issues](#) were recently promoted with Montana’s congressional delegation in visits to the Hill on 3/2/22 by 8 Montana Principals (5 representing MAEMSP and 3 representing MASSP) and Executive Director as part of the NAESP National Leaders Conference and NASSP National Advocacy Conference in Washington D.C.

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.
- All SAM and Affiliate Conferences have established a Twitter feed for conference attendees to communicate ideas and thoughts during the conference.
- Opportunities for role-alike sessions and regional sessions have been developed at conferences using the strategies of ‘Ed Camp’ and now ‘Boom Discussions’, where topics for dialogue are created real-time by the group in attendance.
- Blended conference delivery (both in-person and virtual) required significant research in to effective strategies for delivery and the technical capacity to deliver any size conference with keynotes, clinic sessions, exhibitor hall, and networking strategies. The SAM office team completed the research and have successfully held (facilitated in-person and provided the virtual platform) the [SAM Administrators Institute 2021](#).
- Virtual conference delivery has expanded the use of social media in communicating during the conferences. Virtual conference delivery required significant research into effective strategies for delivery and the technical capacity to deliver any size conference with keynotes, clinic sessions, exhibitor hall, and networking strategies. The SAM office team completed the research and have successfully held (facilitated and provided the virtual platform) [MASS/MCASE Virtual Fall Conference 2021](#).
- Due to COVID-19 and the impact on Conference delivery, SAM is prepared to make changes to delivery of conferences as necessary.
- SAM continues efforts to utilize Twitter and Facebook to mirror messages being sent to membership through email, newsletters and SAM Updates to support social media information for our members.
- [Social media \(Facebook, Twitter and other platforms\)](#) are regularly used to push out information important to SAM members.
- [Virtual tools to deliver ‘blended’ \(in-person and virtual\) professional learning opportunities \(conferences and meetings\)](#) are being enhanced and utilized in all facets of our association work.
- [Virtual tools to deliver ‘blended’ \(in-person and virtual\) professional learning at the 2022 Montana Principals Conference \(January 23-25\) and 2022 MASS/META/MCASE Spring Conference \(March 21-22\).](#)
- [A Twitter presence through hashtag #](#) was created for both conferences.

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).

- The [SAM Leaders Professional Learning Program \(LPLP\)](#) is a best practices professional learning delivery system that personalizes learning for Montana administrators. Over the past 7 years, SAM LPLP has supported 490 administrators in meeting their personalized professional learning needs.
- [SAM LPLP 2020-21 Executive Summary](#) provides specific details of the progress of the 70 SAM LPLP members and 8 [Collegial Learning Networks](#) during the 2020-21 school year, with [SAM LPLP Providers](#) (coach/mentors) to personalize a professional learning plan enhancing their ability to serve their students, school and community. This program met the needs of personalized professional learning for about 6.4% of our 1100 SAM members.
- [SAM LPLP Providers](#) are the coach/mentors for those who choose to have this personalized learning. These highly talented, experienced educators and leaders have been with the SAM LPLP for many years.
- [SAM LPLP 2021-22](#) is underway with 53 administrators registered (10/20/21) and 7 [CLNs](#) collaborative efforts in progress, and the [SAM LPLP Huddle](#) highlighting resources. [SAM LPLP Summit 2021-22](#) on July 27. Over 50 SAM members participating and growing every day.
- The MASS board approved continued support of the SAM LPLP program for new leaders by agreeing to pay the SAM LPLP registration fee (\$500) for all superintendents new to their position in 2021-22. This action allowed the formation of a Collegial Learning Network of superintendents new to their position in 2021-22 ([NS CLN](#)) providing increased supports through mentoring, a main benefit of the SAM LPLP. The NS CLN has 17 superintendents participating.
- SAM LPLP 2021-22 has established a New Principal Collegial Learning Network ([NP CLN](#)) with 18 principals participating.
- SAM LPLP 2021-22 has established an Aspiring Superintendent Collegial Learning Network ([AS CLN](#)) with 6 principals/early career superintendents participating in this partnership with AASA – National Superintendents Association, served by National mentor David Schuler (former AASA National Superintendent of the Year 2018 and AASA President 2019).
- The SAM LPLP 2021-22 service to 53 SAM members is an added value for participants during the COVID-19 pandemic. The Providers report the upsurge in support provided to the administrators in the program. See the [SAM LPLP 2021-22 1st Quarter Data Collection Report](#) and the [SAM LPLP 2021-22 Provider Quarterly Reflection Report](#).
- SAM is assisting the OPI, OCHE, Governor's office, and other education stakeholders with professional development through the SAM Leaders Professional Learning Program with contemporary information as outlined in the [SAM LPLP Mid-Year Executive Summary 2021-22](#).
- SAM LPLP continues to thrive in providing opportunities for quality mentoring to 55 Montana administrators serving our schools in what could be characterized as challenging times (due to lingering pandemic and political culture) in education.

- [SAM LPLP 2021-22](#) is thriving to support 56 Montana administrators participating in the program with 10 coach/mentors (Providers) working with individuals and also providing lead Provider organization to 7 Collegial Learning Networks (CLN).
- Planning for the SAM LPLP 2022-23 is underway with consideration of many administrators will be new to their position in schools all across the state and the LPLP will be critically needed to support the development of those newer leaders.

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

- [SAM Needs Assessment 2021 Executive Summary](#) and the [SAM Needs Assessment Data Disaggregated by Affiliate 2021](#) provides information for our association's future professional learning, advocacy and items important for member participation. The SAM board reviewed and discussed the SAM Needs Assessment 2021 at the January 20, 2021 board meeting.
- SAM Needs Assessment results will be used in the planning of professional development and advocacy opportunities for the 2021-22 school year.
- SAM Needs Assessment results was used in the development and planning of the SAM Administrators Institute 2021, July 27-28.
- [SAM Administrators Institute 2021](#) - "Reimagining the Future with Strategies of Hope Moving Forward", a blended delivery conference on July 22-27, 2021, was a success. Celebrating 50 Years of SAM ([presentation recording](#)) with a look at our rich history and the education leaders who contributed to our success was celebrated at SAM AI 2021. [SAM AI 2021 Conference Evaluation](#) and [SAM AI 2021 Conference Focus Zone Sessions Evaluation](#).
- [2021 MASS/MCASE Virtual Fall Conference](#) – "Inclusive Leadership – An Invitation to Thrive Together" was successfully held on September 20-22. A SAM Executive Board decision was made in August (8-25-21) to hold conferences and meetings virtual format only based on the COVID-19 delta variant surge that was happening at the time.
- [MCEL 2021](#) is Virtual on October 20-22, 2021. [Schedule at a Glance](#) and [Sessions](#).
- [2022 Montana Principals Conference](#) is being planned for blended delivery, January 22-25 in a format that will be great for professional learning and networking.
- [SAM Needs Assessment Survey Executive Summary 2022](#) and [SAM Needs Assessment Data Disaggregated by Affiliate 2022](#) results will be used to assist in decisions for professional learning, advocacy and ensuring leadership has input into decisions impacting the education of Montana's children.
- [SAM Needs Assessment 2022](#) results coupled with the [2021-22 SAM LPLP Mid Year Data Collection](#) were synthesized allowing the development of the top ten professional learning needs for administrators serving Montana's schools. This top 10 list with descriptions was provided to OPI by requests of Deputy Superintendent, Sharyl Allen, to assist OPI with statewide professional development offerings in the coming year.

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 2021-22 1st Quarter Report](#) shows 1035 SAM members. This is 58 more than 1st quarter 2020-21, at record levels for 1st quarter, even considering the effects of the pandemic on associations. SAM record membership is 1107 set in 2020-21.

- 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 presidents/directors.
- Reference the [SAM Membership Report](#) webpage for each annual report.
- [SAM Membership 2021-22 2nd Quarter Report](#) shows 1053 SAM members.
- [SAM Membership 2021-22 3rd Quarter Report](#) shows 1057 SAM members. This is likely the final number of members for the 2021-22 year. It falls short of the record 1107 members set in 2020-2, though all-out efforts of SAM affiliate regional presidents and directors have left no stone unturned in seeking eligible members.
- The plans for launching the 2022-23 SAM membership drive are being prepared for an April 12, 2022 launch date.
- [2022-23 SAM Membership Dues Increase Request and Rationale](#) – SAM board action on 3/22/22 was recommended to continue development of membership while addressing the needs of the SAM office team to provide services and opportunities to SAM members.

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

- Vacancy fill information has been collected with reports located on the [Employment Opportunities](#) webpage.
- [2020-21 Montana District/School Leadership Staffing Report](#) is being used to longitudinally review the changes in leadership staffing for Montana public schools over the years.
- The SAM office team (lead by Kim Scofield) has developed the [2019-20 SAM Administrative Vacancy Report](#) presented to the SAM Board at their 4/9/20 Board meeting. This is the first report in a series to provide longitudinal data on the recruitment and retention of school administrators in Montana.
- The [2020-21 SAM Administrative Vacancy Report](#) was completed and reviewed by the SAM Board on 1/20/21. This report has been used as recruitment and retention information resource on several bills during the 2021 legislative session.
- The 2021-22 SAM Administrative Vacancy Report will be prepared for review of the SAM Board in 3rd quarter of 2021-22.
- Reference the [SAM Employment Opportunities](#) webpage (quick link on the home page) to review vacancy information and vacancy fill information for 2021-22 – [Superintendent Vacancies](#), [Principal Vacancies](#), [Special Education Vacancies](#), and [Other Administrative Vacancies](#).
- The SAM office continues efforts to develop vacancy fill research and reporting that will assist in the development of strategies for the recruitment and retention of quality administrators for our Montana schools.
- [The Montana District/School Leadership Staffing Report 2021-22 and 2021-22 SAM Administrative Vacancy Report Executive Summary](#) are to be used for advocacy and factual information related to the recruitment and retention of quality educators for Montana schools.
- Lack of access to data necessarily generated by OPI has delayed the completion of the [Montana District/School Leadership Staffing Report 2021-22 and 2021-22 SAM Administrative Vacancy Report Executive Summary](#). The importance of the reports for use during the upcoming 2023 legislative is imperative that we get access to the data at OPI to complete the reports. The lagging OPI Data Modernization Project (supported by \$13 million

in state allocated federal ESSER funds) is impacting SAM's ability to have access to necessary data.

- Anecdotally, the data appears to show 46 superintendent openings this winter/spring 2022 – the highest on record in recent years. That in turn will impact the number of potential central office and building level administrative openings as the superintendent positions are filled. A true indication of the impending educator/administrator shortage.

This 3rd quarter 2021-22 report of progress on the SAM Strategic Plan 2018-22 describes significant effort of our organization to focus on the established goals through disruption due to the COVID-19 pandemic. A huge ... Thank you! ... to all SAM members for your attention and contributions to the successful implementation of the SAM Strategic Plan, and more importantly, for your stellar work to create a safe, healthy education environment for your students!

Respectfully submitted,

A handwritten signature in blue ink that reads "Kirk J. Miller". The signature is written in a cursive style with a large initial 'K'.

Kirk J. Miller
SAM Executive Director