

Executive Director's Report to the SAM Board of Directors
4th Quarter 2019-20 Strategic Plan Update
June 11, 2020



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 4th Quarter 2019-20 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.

- Significant progress continues 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 and MT-PEC Unified Professional Development Flexibility and Efficiency Series, 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 communicated effectively with all partners, state officials and legislators during the 66th legislative session. SAM advocacy priorities, positions and resolutions were upheld and promoted throughout the legislative session.
- Following the legislative session, meetings have been held with MT-PEC, OPI staff, and BPE staff, to interpret bills and the subsequent rule making authority to implement the new laws that will impact our schools.
- MT-PEC has collaborated in developing a unified plan for the professional development of our members on key topics related to funding, flexibility, efficiency, safety and security, community ownership and local control. A [Framework](#) including a planned syllabus, with desired outcomes driving the content is what we intend to deliver to our members over the 2019-20 year. The launch of this PD Series will be at MCEL 2019.
- 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.
- Continued topics of importance were the implementation of [HB 745 protecting online student information](#), [DPHHS rules on healthy learning environments in schools](#), Educator [Recruitment and Retention](#) issues, and a variety of [federal issues](#).
- The COVID-19 pandemic impact on our communities and schools required action on behalf of SAM increase communication with MT-PEC, state and federal leaders and legislators. This resulted in collaboration to provide our members with access to streamlined, critical information for implementing school services during the pandemic.
- Extensive continued efforts to streamline the information flow and advocacy efforts related to COVID-19 continued through the end of the school year and into June. Efforts continue to develop guidance for School Re-Entry and Resources After Pandemic for the reopening of Montana schools in the fall have included direct communication with MT-PEC, the Governor's office, OPI, and several task force, study groups and advisory committees with SAM members contributing to the effort.

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 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.
- Professional development collaboratively developed by MT-PEC is on the calendar of events for our members throughout the 2019-20 school year.
- [Use of Board Leadership Web Meetings and fall/winter conferences to get information, to be influenced by SAM, out to all affiliate members.](#)

- Use of [SAM Update](#) and [SAM Bulletin](#) to report on actionable items.
- The COVID-19 pandemic impact on our communities and schools required action on behalf of SAM to revise the calendar of meetings and conferences to meet the needs of our members. All meetings offered for the remainder of the 2019-20 will be virtual.
- The COVID-19 pandemic impact on our communities and schools led to revision of the calendar of meetings, professional learning and conferences organized by SAM and affiliates. The [SAM Web Calendar](#) has been updated to show the calendar changes.

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 2019-20, [2019 Legislative Session](#), [SAM Delegate Assembly 2019 Business Meeting Recommendations 10-18-19](#) 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](#).
- SAM was a leader in the discussion to create the MT-PEC unified plan ([Framework](#)) for the professional development of our members on key topics related to funding, flexibility, efficiency, safety and security, community ownership and local control.
- META is in a lead role through the Student Data Privacy Consortium/Terms of Service Agreement Project to work with OPI and all school districts to protect student data privacy, comply with [HB 745](#) passed in the 2019 legislative session, and provide training and easy access for our members and school districts to meet the student data privacy criteria.
- [SAM members made aware of the MT-PEC Flexibility Professional Development Series](#) and posted on the SAM Professional Learning webpage for easy access of our members.
- META completion of the SDPC/TOS Project leading to the formation of the Montana Student Privacy Alliance ([MTSPA](#)) to protect online student information. Work completed during 2nd Quarter and [Announced](#) statewide on January 15, 2020.
- Follow up on [Recruitment and Retention of Quality Educators](#) compiled and shared by SAM with the Education Interim Committee on January 16, 2020. A key indicator of SAM being the go to organization on important issues.
- Continued follow up on implementation of the [DPHHS rules](#) on healthy learning environments in schools.
- 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.

- [SAM COVID-19 Information for Schools](#) webpage continues to be updated as a key source for SAM members to access streamlined information about the impact of COVID -19 on our schools and the education of our children.

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.

- 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). 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.
- Student data privacy is being addressed as a META project in collaboration with OPI and MTSBA, as mentioned in detail above.
- SAM is involved in conversations about interoperability standards for digital platforms that will insure student data security and school safety.
- In addition to the items of research and action in 1.1.3, SAM continues to work diligently with OPI on the implementation of HB 351 Transformational Learning Act, HB 387 Advanced Opportunity Act (See [Transformational Learning webpage](#)), Vaping, and a variety of other legislation that requires vigilant attention during implementation.
- SAM executive director continue to serve on the Montana Safe Schools Advisory Council. SAM executive Director has volunteered to serve on the planning committee for the Jeremy Bullock Safe Schools Summit 2020.
- The COVID-19 pandemic impact on our communities and schools required action on behalf of SAM to focus attention on the Governor’s COVID-19 Advisory Committee and the Montana School Safety Advisory Committee (MSSAC) to provide information and support for our public schools.
- SAM assisted in convening the MSSAC to consider the guidance for schools on [Education Supplies and School Meals during COVID-19](#). SAM advocated for protecting online student data and flexibility in meeting the law (20-7-1236) requiring Data Privacy Agreements for all technology platforms, software and apps. [Governor’s Directive on 4/7/20](#) provided that flexibility (p. 3) for schools.
- SAM continues to assist in the effort for guidance on School Re-entry and Resources after Pandemic through participation on the Montana Safe Schools Advisory Council. This Council will be providing the approved guidance for reopening schools by the end of June.

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, and continue to participate in representing many significant educational issues for the Legislative [Education Interim Committee](#).

- Continued active participation by SAM members on the many Committees, Task Force, Negotiated Rule Making Committees, 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.
- In all issues of advocacy during the legislative session and following the legislative session, SAM has worked with fairness and honesty to ensure our priorities are held in highest regard. The same is true for creating the MT-PEC unified plan ([Framework](#)) for the professional development to be launched at MCEL 2019.
- 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.
- Extensive continued efforts to streamline the information flow and advocacy efforts related to COVID-19 continued through the end of the school year and into June. Efforts continue to develop guidance for School Re-Entry and Resources After Pandemic for the reopening of Montana schools in the fall have included direct communication with MT-PEC, the Governor's office, OPI, and several task force, study groups and advisory committees with SAM members contributing to the effort.
- The SAM Delegate Assembly Steering Committee (DASC) has effectively addressed necessary federal and state advocacy issues related to COVID-19 and its impact on our schools.

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 2019, and production of the [GREAT VII](#) publication (released at MCEL 2019) 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 VII](#).
- SAM Delegate Assembly 2019 approved the [SAM Delegate Assembly 2019 Business Meeting Recommendations 10-18-19](#) for consideration of the membership at the Annual Business meeting on October 18, 2019 at MCEL in Billings.
- In all issues of advocacy during the legislative session and following the legislative session, SAM has worked with fairness and honesty to ensure our priorities are held in highest regard. The same is true for creating the MT-PEC unified plan ([Framework](#)) for the professional development.
- 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 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.

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 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](#), podcasts during the legislative session, [2019 Legislative Session](#) webpage, [Delegate Assembly](#) webpage have been used to actively support SAM activities, meetings and events in communicating evolving perspectives to SAM members.
- SAM has reported to all members through website, regional meetings and conferences to combined talents of the membership to establish the [SAM Advocacy Priorities, Positions, Resolutions approved 10/18/19](#), and is in the process of preparing for the Delegate Assembly 2020 with the SAM Delegate Assembly Steering Committee (DASC) leading those developments.
- Established the [SAM Call for Delegate Assembly Positions Resolutions 2020](#) and the [Request for Affiliate Presidents to Select Delegates](#).
- SAM Board to consider the appointment of SAM Delegate Assembly Steering Committee Members at their April 9, 2020 meeting. Board also considering postponing the Delegate Assembly 2020 from June to late July due to the COVID-19 pandemic.
- SAM Board appointed the DASC committee members for the 2020-21 year at their meeting on April 9, 2020.
- The DASC (Delegate Assembly Steering Committee) met on June 9, 2020 to begin the development of the recommendation for SAM Delegate Assembly 2020 scheduled for July 29-30 (virtually delivered).

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

- SAM Needs Assessment 2019 results -- [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.
- SAM Needs Assessment results were used to establish the [SAM Administrators Institute 2019](#) theme and agenda.
- [The SAM Needs Assessment 2020](#) was conducted in November and December and the results are being reported to the SAM Board at their meeting on January 26, 2020.
- [SAM Needs Assessment 2020 Executive Summary](#) and [SAM Needs Assessment Data Disaggregated by Affiliate 2020](#) provide data resources for making decisions about future key issues, professional learning and advocacy for SAM.
- SAM Needs Assessment results will be used in the planning of professional development and advocacy opportunities for the remainder of the 2019-20 school year and the 2020-21 school year.
- SAM Needs Assessment results have been used in the development and planning of the SAM Virtual Administrators Institute 2020 (scheduled for July 27-28).

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](#) continues meeting quarterly to review the financial well-being of SAM and affiliates. The next meeting is on January 26, 2020.
- [SAM Investment and Finance Committee](#) reviewed the finances and proposed budgets for 2020-21 of SAM and all affiliates at the April 2, 2020 Executive Board meeting.
- [SAM 990 and MASS 990EZ for 2018](#) are nearly complete and will be filed in April 2020 following review of the SAM Board.
- [SAM 990 and MASS 990EZ for 2018](#) have been completed and filed per review of the SAM Board in April and action of the SAM Board at their June 11, 2020 meeting.
- [SAM Investment/Finance Committee](#) met on June 11, 2020 to review the SAM, and all affiliates, adopted budgets for 2020-21, reviewed the Managed Fund Portfolio investments, and reviewed SAM Business Partnerships with acknowledgement of the impact of COVID-19 on financial planning.

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 focused on both adequacy and equity in funding for our public schools.
- SAM Delegate Assembly met on June 13-14, 2019 approving the [SAM Delegate Assembly 2019 Business Meeting Recommendations 10-18-19](#) with continued priority to support adequate and equitable funding of public schools.
- SAM has reported to all members through website, regional meetings and conferences to combined talents of the membership to establish the [SAM Advocacy Priorities, Positions, Resolutions approved 10/18/19](#), and is in the process of preparing for the Delegate Assembly 2020 with the SAM Delegate Assembly Steering Committee (DASC) leading those developments. Much of the platform addresses equitable, adequate funding for schools.
- The COVID-19 pandemic impact on our communities and schools required action on behalf of SAM to advocate for the [Federal CARES Act](#) impact on Montana schools - MT-PEC sent a [recommendation](#) to the Governor requesting the allocation and distribution of the Governor's Emergency Education Relief Fund (\$8.765 million) for our K-12 schools. MT-PEC made a [recommendation](#) for the 10% state office set aside in the State (SEA) Emergency Education Relief Fund (\$4.1 million) to be allocated and distributed to schools in an equitable and flexible use way. These efforts are intended to provide our school districts with the relief funds assistance that can be used to flexibly meet the local needs and provide access to the funding when needed.
- [Federal CARES Act guidance document](#) (on the [OPI COVID-19](#) webpage) and the [Estimated State School Emergency Relief Fund Allocations FY 2020](#) (\$41.3 million) is available for review to see the impact on your school.
- The SAM Delegate Assembly Steering Committee (DASC) has effectively addressed necessary federal and state advocacy issues related to COVID-19 and it's impact on our schools.
- SAM DASC took a lead in advocacy efforts on behalf of SAM on COVID-19 Cares Act relief funding – ESSER and GEER distribution to Montana schools.
- ESSER (Elementary and Secondary School Emergency Relief) Funds for Montana are available through application on E-Grants system. Click [HERE](#) to access all information.
- Equitable Services Allocations under Secretary of Education Guidance raised concerns about equity and fairness which was addressed by SAM and the review of the DASC. See [SAM Statement to National Associations](#). See [5/14/20 Sen Tester Letter to Secretary DeVos](#). See [Billings Gazette Article](#) outlining the issues. See [Equitable Services LPI Report on CARES Funds](#) shift to non-public schools under Secretary DeVos Guidance -- released 6/10/20, showing a nationwide shift of \$1.3 Billion of CARES funds to non-public schools (Montana shift is estimated to be approximately \$3 Million).

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.
- The release of the Montana Recruitment and Retention Survey Final Analysis (Just in Time Report) is scheduled for MCEL 2019 with representatives of REL NW and the Rand Corporation presenting the results.

- MT-PEC has collaborated in developing a unified plan for the professional development of our members on key topics related to funding, flexibility, efficiency, safety and security, community ownership and local control. A [Framework](#) including a planned syllabus, with desired outcomes driving the content is what we intend to deliver to our members over the 2019-20 year. The launch of this PD Series will be at MCEL 2019.
- SAM and member administrators participated in the K-12 Vision Group Strategic Planning session, August 20, 2019 resulting in the revised, adopted [Strategic Plan](#).
- SAM worked with MT-PEC on the completion of the [MT-PEC Flexibility Professional Development Series](#) and posted this professional development on the SAM Professional Learning webpage for easy access of our members.
- META completion of the SDPC/TOS Project leading to the formation of the Montana Student Privacy Alliance ([MTSPA](#)) to protect online student information. Work completed during 2nd Quarter and [Announced](#) statewide on January 15, 2020.
- Progress on [Recruitment and Retention of Quality Educators](#) was compiled and shared by SAM with the Education Interim Committee on January 16, 2020.
- Continued participation of SAM and MT-PEC on implementation plans for the [DPHHS rules](#) on healthy learning environments in schools.
- 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.
- Extensive continued efforts to streamline the information flow and advocacy efforts related to COVID-19 continued through the end of the school year and into June. Efforts continue to develop guidance for School Re-Entry and Resources After Pandemic for the reopening of Montana schools in the fall have included direct communication with MT-PEC, the Governor's office, OPI, and several task force, study groups and advisory committees with SAM members contributing to the effort.

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](#) operated with fidelity and tenacity through the 2019 legislative session. The tools to successfully participate as a member of the SAMLN19 are web-based and were heavily utilized by the over 100 SAMLN members. On 1-3-19 a webinar training was provided for all SAMLN19 members.
- See the [SAM 2019 Legislative Session Summary](#) to review the success of the work to meet SAM advocacy priorities during the 66th Montana Legislative Session.
- In preparation for SAM Delegate Assembly 2020 and the 2021 legislative session, SAM will continue development of the SAM Legislative Network in order to successfully advocate for the priorities established during the delegate assembly.
- 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.

- An example of the advocacy approval network during the urgency of needed positions can be found in the request for flexibility in key mandates under IDEA during COVID-19 pandemic that created the SAM responds to Calls for Action from national associations in support of the timeline, procedural, and fiscal "flexibilities" requested in the [SAM Letter to MT Congressional Delegation](#). This was sent through AASA Action Center on 4/7/20 and in a letter sign on with NASSP and NAESP on 4/8/20.
- SAM, using the DASC process took action on COVID-19 federal advocacy issues
 - Consideration of needed emergency K-12 education funding in COVID-19 relief package bill. See letters to [Sen Tester](#), [Sen Daines](#), and [Rep Gianforte](#)
 - Equitable Services Allocations under Secretary of Education Guidance. See [SAM Statement to National Associations](#).
 - Homework Gap and E-rate request - Congress must ensure the next COVID-19 funding package include \$4 billion for the E-Rate program, to help connect millions of students to the internet so they can continue their education and planning for the possibility of interruptions to classroom teaching and learning during the 2020-2021 school year. See [SAM Sign On](#).
- The DASC (Delegate Assembly Steering Committee) met on June 9, 2020 to begin the development of the recommendation for SAM Delegate Assembly 2020 scheduled for July 29-30 (virtually delivered). That discussion included developing the SAM Legislative Network 2021 (SAMLN21) to assist in advocacy during the 2021 Legislative 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 were provided on the [SAMLN19](#) web page using web-based documents weekly and a podcast for each Update was 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 examples.
- See the [SAM 2019 Legislative Session Summary](#) to review the success of the work to meet SAM advocacy priorities during the 66th Montana Legislative Session and build the skills of our members to participate in the session.
- SAM Delegate Assembly met on June 13-14, 2019 approving the [SAM Delegate Assembly 2019 Business Meeting Recommendations 10-18-19](#) for consideration of the SAM membership at the Annual Business Meeting at MCEL 2019.
- [SAM will utilize the materials and strategies developed to promote effective advocacy strategies.](#)

- SAM executive director will be presenting “Education Advocacy 101” in a clinic session at the Montana Council for Exceptional Children (MCEC) Conference in February 2020.
- SAM continues to use processes established through the delegate assembly process to provide training to our members for effective advocacy.
- The DASC (Delegate Assembly Steering Committee) met on June 9, 2020 to begin the development of the recommendation for SAM Delegate Assembly 2020 scheduled for July 29-30 (virtually delivered). That discussion included training development for delegates and also for the membership to prepare for the 2021 Legislative session.

2.4.2 Create an advocacy strand at MCEL beginning in 2019.

- MT-PEC has collaborated in developing a unified plan for the professional development of our members on key topics related to funding, flexibility, efficiency, safety and security, community ownership and local control. A [Framework](#) including a planned syllabus, with desired outcomes driving the content is what we intend to deliver to our members over the 2019-20 year. The launch of this PD Series will be at MCEL 2019.
- MCEL 2019 included a pre-conference session and sessions all day on October 17, 2019 on the [MT-PEC Flexibility Professional Development Series](#). Webinars were recorded and placed on the SAM website for easy access and use by SAM members.
- SAM continues to promote advocacy issues to be included in the agenda for MCEL 2020.
- MCEL 2020 will be a Virtual Conference and SAM will continue to support the advancement of an advocacy strand in the virtual conference presentations.

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.
- 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. The SAM Federal Advocacy Priorities 2019-20 are included in the [SAM Delegate Assembly 2019 Business Meeting Recommendations 10-18-19](#). The one page reference will be updated and uploaded to the [Federal Issues](#) webpage following approval of the SAM membership.
- Federal advocacy information is available to all SAM members on the [Federal Issues Followed by SAM](#) webpage. Many updates to federal issues are described on the [Federal Issues](#) webpage.
- SAM has developed the [Federal Issues](#) webpage for easy member access to key federal issues and the status of important matters in Congress.
- 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. An example of the advocacy approval network during the

urgency of needed positions can be found in the request for flexibility in key mandates under IDEA during COVID-19 pandemic that created the SAM responds to Calls for Action from national associations in support of the timeline, procedural, and fiscal "flexibilities" requested in the [SAM Letter to MT Congressional Delegation](#). This was sent through AASA Action Center on 4/7/20 and in a letter sign on with NASSP and NAESP on 4/8/20.

- SAM, using the DASC process took action on COVID-19 federal advocacy issues
 - Consideration of needed emergency K-12 education funding in COVID-19 relief package bill. See letters to [Sen Tester](#), [Sen Daines](#), and [Rep Gianforte](#)
 - Equitable Services Allocations under Secretary of Education Guidance. See [SAM Statement to National Associations](#).
 - Homework Gap and E-rate request - Congress must ensure the next COVID-19 funding package include \$4 billion for the E-Rate program, to help connect millions of students to the internet so they can continue their education and planning for the possibility of interruptions to classroom teaching and learning during the 2020-2021 school year. See [SAM Sign On](#).
- The SAM [Federal Issues](#) webpage is updated with current federal advocacy efforts described with links to details.

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 continued through 3rd Quarter of 2018-19 with minimal participation. They were discontinued due to the lack of participation.
- Ed Camp strategies were implemented during the MASS Fall Conference (as Class Size Caucus discussions). This resulted in engaging dialogue around the most important contemporary topics.
- All SAM and Affiliate Conferences have established a Twitter feed for conference attendees to communicate ideas and thoughts during the conference.
- SAM has developed a Conference App for each affiliate conference that allows social media communication and pushing of key happenings during meetings and conferences.
- SAM is working to use effectively Twitter and Facebook social media tools to push information and communications to our members.
- 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.

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](#) provides specific details of the progress of the 55 SAM LPLP members and 9 Collegial Learning Networks during the 2018-19. This program met the needs of personalized professional learning for about 5% of our SAM members.
- The [SAM Leaders Professional Learning Program \(LPLP\) 2019-20](#) is a best practices professional learning delivery system that personalizes learning for Montana administrators. Over the past 6 years, SAM LPLP has supported 428 administrators in meeting their personalized professional learning needs. In 2019-20, 87 administrators have joined the LPLP, forming ten [Collegial Learning Networks](#) with coach/mentors to personalize a professional learning plan enhancing their ability to serve their students, school and community. This is the largest number of participants in the SAM LPLP since it began in 2013-14, approximately 8% of our SAM membership.
- The focus on new leaders and the supports provided to them through the SAM NL(New Leaders) CLN, NS (New Superintendent) CLN, and AS (Aspiring/Early Career Superintendent) CLN continue to be a focus of the LPLP.
- The MASS board approved 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 2019-20. This action allowed the formation of a Collegial Learning Network of superintendents new to their position in 2019-20 (NS CLN) providing increased supports through mentoring, a main benefit of the SAM LPLP.
- SAM and MASBO collaborated to offer and New Superintendent/Clerk Finance Summit on July 29, 2019 as a part of the [SAM Administrators Institute 2019](#) to increase mentoring and collaboration for new superintendents.
- [SAM LPLP 2019-20 Mid-Year Executive Summary](#) has been prepared to share the overview and details of this SAM professional learning delivery system. Currently there are 90 SAM members participating in the SAM LPLP with 11 highly qualified providers serving as coach/mentors and 11 Collegial Learning Networks working collaboratively on key educational topics and solutions for our schools (including mentorship). The growth of the SAM LPLP and the outstanding professional learning being provided is a credit to the vision and persistence of the SAM Boards over the years to establish these rich opportunities for our members.
- The SAM LPLP 2019-20 service to 90 SAM members is an added value for participants during the COVID-19 pandemic and school closure directives. The Providers report the upsurge in support provided to the administrators in the program.
- SAM LPLP 2019-20 mentorship efforts are collecting data through surveys of participants on the value of the program related to their satisfaction and longevity in their administrative position. This data will be included in the SAM LPLP 2019-20 Executive Summary to be produced in July 2020.

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

- SAM Needs Assessment 2019 results -- [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.
- SAM Needs Assessment results were used to establish the [SAM Administrators Institute 2019](#) theme and agenda.
- The SAM Needs Assessment 2020 was conducted in November and December and the results are being reported to the SAM Board at their meeting on January 26, 2020.
- [SAM Needs Assessment 2020 Executive Summary](#) and [SAM Needs Assessment Data Disaggregated by Affiliate 2020](#) provide data resources for making decisions about future key issues, professional learning and advocacy for SAM.
- The results of the SAM Needs Assessment are being used by SAM and Affiliates for professional learning and advocacy planning.
- SAM Needs Assessment results have been used in the development and planning of the SAM Virtual Administrators Institute 2020 (scheduled for July 27-28).

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 2019-20 1st Quarter Report](#) shows 969 SAM members. This is 13 more than 1st quarter 2018-19, at record levels for 1st quarter.
- 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 2019-20 2nd Quarter Report](#) shows 1074 SAM members. This is a new all-time record for membership! The strategies to make membership available to administrators all across the state in a region manner have proven successful.
- [SAM Membership 2019-20 3rd Quarter Report](#) shows 1083 SAM members, a new all-time record for membership!
- Plans for are in place for launching the 2020-21 SAM Membership Drive beginning on April 20, 2020.
- [SAM Membership 2019-20 4th Quarter Report](#) shows 1083 SAM members, a record.
- SAM Membership Drive was launched on April 20 and regular reports on the progress of the developing membership are given to the SAM Board and affiliate Boards. See the [SAM Membership Report](#) webpage for detailed information.

- 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 winter.
 - Vacancy fill information has been collected with reports located on the [Employment Opportunities](#) webpage. The SAM Annual Administrative Vacancy Report will be finalized this winter and made available to decision makers on the effort to recruit and retain quality educators for Montana.
 - The SAM office continues to make progress in quantifying and preparing a SAM Annual Administrative Vacancy Report to assist in decision making for recruitment and retention of administrators in our state. We plan to have this information available prior to the hiring cycle in the spring of 2020.
 - The SAM office team (lead by Kim Scofield) has developed the [Administrator 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 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.

This 4th quarter 2019-20 report of progress on the SAM Strategic Plan 2018-22 describes significant effort of our organization to focus on the established goals. A big ... Thank you! ... to all SAM members for your attention and contributions to the successful implementation of the SAM Strategic Plan!

Respectfully submitted,



Kirk J. Miller
SAM Executive Director