

Executive Director's Report to the SAM Board of Directors
4th Quarter 2020-21 Strategic Plan Update
June 10, 2021



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 2020-21 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 OCHE Rural Educator Recruitment and Retention Committee and the SAM LPLP; MT-PEC collaborated to develop the [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 legislative Interim. SAM advocacy priorities, positions and resolutions were upheld and promoted throughout the Interim and in preparation for the 67th Montana legislative session beginning in January 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.
- 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, the Governor's office, OPI, 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. See [SAM COVID-19 Information for Schools](#) webpage.
- Extensive continued efforts to streamline the information flow and advocacy efforts related to COVID-19 continued through the end of the school year, through the summer and into the 2020-21 school year. Efforts continue on guidance for School Re-Entry and Resources After Pandemic for the reopening of Montana schools this fall and 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.
- [Preparing for the 2021 legislative session, continued resource development during the pandemic, and the election of a new administration, has required increased communication with all entities and partners associated with SAM. This effective communication is an ongoing effort.](#)
- [The 2021 Legislative Session](#) has the MT-PEC working together on bills that impact K-12 education.
- [Providing resources for our schools related to COVID-19 impact on our schools are regularly uploaded to the SAM COVID-19 Information for Schools webpage.](#)
- [The COVID-19 Information for Schools](#) webpage resources continue to be updated regularly during 4th Quarter. The resources are filtered to be valuable for administrators.
- [SAM promoted with our members' participation on the administrative rule revisions to Chapter 57 \(Educator Licensure\) and Chapter 58 \(Professional Educator Preparation Programs\) Task Force Committees. SAM members have been accepted to contribute as Task Force members in making recommendations for the consideration of the State Superintendent who will make the recommendations for revisions to the Board of Public Education. This work is underway.](#)

- SAM and MT-PEC continue advocacy work by updating the final reports from the 2021 Legislative Session (on the [SAM 2021 Legislative Session](#) webpage). Reference [SAM 2021 Legislative Session Summary](#) and [Podcast](#) of the Summary.
- 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.

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 [SAM 2020-21 Schedule of Conferences and Board Meetings](#) to assist our members with planning for the ever changing schedule of events this school year.
- Use of [SAM Update](#) and [SAM Bulletin](#) to report on actionable items.
- 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.
- [Continued revisions to calendars are happening this quarter due to the move of meetings and the pandemic. The SAM Web Calendar and SAM 2020-21 Schedule of Conferences and Board Meetings are being kept up to date.](#)
- [Calendars are kept up to date and available on the SAM website -- SAM Web Calendar and SAM Schedule of Conferences and Board Meetings.](#)
- SAM Board and Affiliate Boards are reviewing and approving the meetings and events calendars for 2021-22. Reference [SAM Web Calendar](#), [2021-22 SAM Conference – Meeting DRAFT Schedule](#), and [2021-22 SAM and Affiliate Board Meeting DRAFT Schedule](#).

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 2020-21.
- 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 is a leader in the discussions to create the MT-PEC generated resources and guidelines to support professional learning and advocacy.
- META played 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. See [Student Data Privacy/Terms of Service META Project – Launch – MTSPA](#) (Montana Student Privacy Alliance).

- 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. SAM collaborated 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 worked extensively with the Governor’s office in to assist in Governor's office to check on the status of distribution of the Governor's Coronavirus Relief Fund ([CRF](#)) [Information for Schools](#)) distribution of \$65 million to Montana public schools ([Gov CRF K-12 Distribution](#)).
- The [SAM COVID-19 Information for Schools](#) is being updated regularly information streamlined for administrators to reference.
- The [SAM 2021 Legislative Session](#) webpage was created to provide SAM members easy access to all information about the legislative session. The [SAM Legislative Network 2021](#), [SAM Legislative Update 2021](#) and [SAM Bills 2021](#) webpages allow access to detailed information that is kept contemporary throughout the legislative session.
- The [2021 Legislative Session](#) webpage is developed as a comprehensive resource for SAM members to follow the legislative session.
- The [SAM COVID-19 Information for Schools](#) webpage is developed as a comprehensive resource for SAM members’ use.
- SAM has, with integrity, worked ensure our members have had timely, important information on the [2021 Legislative Session](#) and [SAM COVID-19 Information for Schools](#) webpages.

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 5 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.

- 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 assisted in the effort for guidance on School Re-entry and Resources after Pandemic through participation on the Montana Safe Schools Advisory Council and the Governor’s Committee for Reopening Schools. See [Reopening MT Schools Guidance 7.2.20](#) and [The Governor’s Plan for Reopening Safe and Healthy Schools 7.2.20](#).
- The [SAM COVID-19 Information for Schools](#) is being updated regularly information streamlined for administrators to reference. The research developed is included on the webpage for access of all SAM members.
- The [SAM 2021 Legislative Session](#) webpage was created to provide SAM members easy access to all information about the legislative session. The [SAM Legislative Network 2021](#), [SAM Legislative Update 2021](#) and [SAM Bills 2021](#) webpages allow access to detailed information that is kept contemporary throughout the legislative session. Significant research and work on aligning [SAM Advocacy Priorities for the 2021 Legislative Session](#) with the 3189 bill drafts is underway. The Updates show the SAM stance, overview of bill content, and testimony provided for each of the bills under consideration.
- The [2021 Legislative Session](#) webpage is developed as a comprehensive resource for SAM members to follow the legislative session.
- The [SAM COVID-19 Information for Schools](#) webpage is developed as a comprehensive resource for SAM members’ use.
- SAM and our members continue to participate in the Montana School Safety Advisory Council and are connected as well with the Montana Safe Schools Center at the University of Montana. This collaboration provides our members with access to research-based, vetted school safety, social emotional learning and trauma informed resources.

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 participated in representing many significant educational issues for the Legislative [Education Interim Committee](#) and other Interim Committees (see [SAM 2021 Interim Advocacy Report](#)).
- 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.

- 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 2019-20 school year, through the summer and into the 2020-21 school year. Efforts developed guidance for School Re-Entry and Resources After Pandemic for the reopening of Montana schools in the fall 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. See [Reopening MT Schools Guidance 7.2.20](#) and [The Governor's Plan for Reopening Safe and Healthy Schools 7.2.20](#).
- 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.
- Extensive effort to consider fairness for all in the implementation of COVID-19 related funding, programming and communication.
- All professional learning opportunities offered by SAM are developed by affiliate leadership with consideration of fairness at the forefront of decisions.
- The 2021 Legislative Session requires the advocacy process established by SAM through the Delegate Assembly, establishing the SAM Legislative Network 2021, and DASC review of issues outside of the language of the [SAM Advocacy Priorities, Positions and Resolutions](#), to consider fairness on each bill and issue.
- The [2021 Legislative Session](#), federal funding under the CARES II Act and American Rescue Plan Act (ARPA), and [SAM COVID-19 Information for Schools](#) resources for our schools have all been considered with fairness, honesty and respect. These areas will all require ongoing professional learning for our members.
- 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.

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 (see [SAM 2021 Interim Advocacy Report](#)), [RISE4MT](#), [MUS Rural Educator Recruitment and Retention Task Force](#), the Zogby poll 2020, and production of the GREAT VIII publication (released at MCEL 2020) 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 VIII 2020.

- SAM Delegate Assembly 2020 held virtually on July 30, approved the [SAM Delegate Assembly 2020 Business Meeting Recommendations 10-14-20](#) for consideration of the membership at the SAM Annual Business Virtual meeting on October 14, 2020.
- 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.
- Extensive effort to consider fairness for all in the implementation of COVID-19 related funding, programming and communication.
- All professional learning opportunities offered by SAM are developed by affiliate leadership with consideration of fairness at the forefront of decisions.
- The 2021 Legislative Session requires the advocacy process established by SAM through the Delegate Assembly, establishing the SAM Legislative Network 2021, and DASC review of issues outside of the language of the [SAM Advocacy Priorities, Positions and Resolutions](#), to consider fairness on each bill and issue.
- The [2021 Legislative Session](#), federal funding under the CARES II Act and American Rescue Plan Act (ARPA), and [SAM COVID-19 Information for Schools](#) resources for our schools have all been considered with fairness, honesty and respect. These areas will all require ongoing professional learning for our members.
- 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.

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.
- SAM Delegate Assembly 2020 (virtually delivered) on July 30 established the [SAM Delegate Assembly 2020 Business Meeting Recommendations 10-14-20](#) for consideration of the membership at the SAM Annual Business Virtual meeting on October 14, 2020.

- All SAM and affiliates related correspondence and communications point to the goals of the [SAM Strategic Plan](#) aligning the work of the association.
- All communications around advocacy, professional learning and being present in decisions that impact the education of our children, use the Strategic Plan as the center focus of the work of the association.
- SAM continues development of communications with all stakeholders and audiences related to the goals of the SAM Strategic Plan.

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

- [SAM Needs Assessment 2020 Executive Summary](#) and the [SAM Needs Assessment Data Disaggregated by Affiliate 2020](#) provides information for our association's future professional learning, advocacy and items important for member participation.
- SAM Needs Assessment results will be used in the planning of professional development and advocacy opportunities for the 2020-21 school year.
- SAM Needs Assessment results was used in the development and planning of the SAM Virtual Administrators Institute 2020, July 27-28.
- [The 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 reviews and discusses the SAM Needs Assessment 2021 at the January 20, 2021 board meeting.
- The SAM Needs Assessment data reported above is being used for the development of conferences and professional learning for the 2021-22 school year.
- The SAM Needs Assessment data and recommendations has been used to develop the SAM Administrators Institute 2021 professional development opportunities.

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.
- The fiscal stability of SAM during the pandemic has been carefully reviewed by the SAM Investment and Finance Committee at quarterly meetings.
- Due to COVID-19 SAM applied for a Paycheck Protection Program loan in the 1st quarter. On January 8, 2021 notice was received that the loan has been forgiven, so the grant amount was used to offset payroll expenses related to declining revenue due to the impact of COVID-19 on the operation of SAM.
- Fiscal stability of SAM has been firmly established. The ongoing work of the SAM Investment and Finance Committee look quarterly at positioning the association to take advantage of the best financial resources for the association.
- SAM's fiscal viability is review quarterly by the SAM Investment and Finance Committee with recommendations to be acted upon by the SAM and Affiliate boards of directors. This process is sound.

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 Interim focused on both adequacy and equity in funding for our public schools.
- SAM members participated in representing many significant educational issues for the Legislative [Education Interim Committee](#) and other Interim Committees (see [SAM 2021 Interim Advocacy Report](#)).
- SAM Delegate Assembly 2020 (virtually delivered) on July 30 established the [SAM Delegate Assembly 2020 Business Meeting Recommendations 10-14-20](#) for consideration of the membership at the SAM Annual Business Virtual meeting on October 14, 2020
- 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 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. SAM collaborated 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 worked extensively with the Governor's office to assist in Governor's office to check on the status of distribution of the Governor's Coronavirus Relief Fund ([CRF](#)) [Information for Schools](#) distribution of \$65 million to Montana public schools ([Gov CRF K-12 Distribution](#)).
- 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.
- 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.
- 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 [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). SAM effort to assist OPI in the work to recalculate the equitable share of CARES

Act ESSER grant funds for private and home schools (failed Secretary of Education Interim Final Rule) with guidance on how to recalculate the equitable share and the cautions of the for being sure to document all of the contacts being made with private and home schools. Important documents to review for the work to recalculate include

- [Revised equitable share process for ESSER 10.1.20](#)
- [CARES Act Funds Equitable Participation Poverty Measurement Tools 10.1.20](#)
- [ESSER Equitable Share Calculation Template rev 10-1-20](#) (possibly being revised 10/6/20 and sent to districts)
- The [SAM 2021 Legislative Session](#) webpage was created to provide SAM members easy access to all information about the legislative session. The [SAM Legislative Network 2021](#), [SAM Legislative Update 2021](#) and [SAM Bills 2021](#) webpages allow access to detailed information that is kept contemporary throughout the legislative session. Significant research and work on aligning [SAM Advocacy Priorities for the 2021 Legislative Session](#) with the 3189 bill drafts is underway. The Updates show the SAM stance, overview of bill content, and testimony provided for each of the bills under consideration.
- SAM advocacy created priority categories and have identified all bill drafts into one of the categories. 1 SF – School Funding is one of the priority categories, being used to track bills related to school funding to allow SAM to advocate for school funding. See [SAM Followed Bills Prioritized Introduced 1.14.21](#) as an example.
- [HB 15](#) passed the legislative session and was signed into law on 2/25/21. For the 3rd consecutive legislative session, that funding of K-12 schools with inflationary increases (1.5% FY 22 and 2.57% FY 23) applied to the components of the funding formula, has passed early in the session! This is helpful for our schools and planning budgets for the next school year.
- All School funding bills are tracked in the 1 SF – School Funding priority category and included in all reports on [SAM Followed Bills 2021](#).
- The [2021 Legislative Session](#) webpage is developed as a comprehensive resource for SAM members to follow the legislative session. Information is updated regularly and uploaded to the [SAM Legislative Update 2021](#) webpage. The most comprehensive report on the status of SAM's advocacy priorities at this time is outlined in [SAMLN21 Legislative Update 10 Transmittal 3-5-21](#) and [Podcast 10](#).
- The [2021 Legislative Session](#), federal funding under the CARES II Act and American Rescue Plan Act (ARPA), and [SAM COVID-19 Information for Schools](#) resources for our schools are under consideration by the legislature. These areas will all require ongoing advocacy from our members and professional learning for our members.
- The [COVID-19 Information for Schools](#) webpage resources continue to be updated regularly during 4th Quarter. 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 and MT-PEC continue advocacy work by updating the final reports from the 2021 Legislative Session (on the [SAM 2021 Legislative Session](#) webpage). Reference [SAM 2021 Legislative Session Summary](#) and [Podcast of the Summary](#). Adequate and Equitable School Funding is the number one priority of the [SAM Advocacy Priorities 2021 Legislative Session](#) as outlined in the Summary.

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 [RISE4MT Update January 2020](#) webpage. [OPI Educator Recruitment and Retention webpage](#)
- See [SAM Administrator Vacancy Report 2019-20](#) 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.
- META completion of the SDPC/TOS Project leading to the formation of the Montana Student Privacy Alliance ([MTSPA](#)) to protect online student information.
- 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, through the summer and into the 2020-21 school year. 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.
- [MT-PEC has established weekly meetings to discuss legislation and strategies for the partnering organizations to work together.](#)
- [MT-PEC has established protocols for communication during the legislative session that allows for effective work together legislation impacting our schools.](#)
- [The 2021 Legislative Session has the MT-PEC working together on bills that impact K-12 education on a daily basis. Highly developed communications.](#)
- [The MT-PEC Virtual Day of Advocacy on 3/22/21 is an example of the effective collaboration of the MT-PEC.](#)
- [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.](#)

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.

- In preparation 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. [SAM Legislative Network 2021 \(SAMLN21\) – Description & Forming the SAMLN21 & 2019 Info](#)
- 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.

- The DASC (Delegate Assembly Steering Committee) met on June 9, 2020 to begin the development of the recommendation for SAM Delegate Assembly 2020 SAM Delegate Assembly 2020 held virtually on July 30, approved the [SAM Delegate Assembly 2020 Business Meeting Recommendations 10-14-20](#) for consideration of the membership at the SAM Annual Business Virtual meeting on October 14, 2020. That discussion included developing the SAM Legislative Network 2021 (SAMLN21) (see above) to assist in advocacy during the 2021 Legislative session.
- The SAMLN21 has been formed with [87 SAM members](#) participating. The [SAMLN21](#) webpage is established to provide a central location for all information to be used by the network members. Training for the SAMLN21 was delivered virtually on December 29, 2020 via Zoom and the [Recording](#) of the training is available to all network members.
- [SAMLN21 Legislative Updates and Podcasts](#) are available weekly. See [SAMLN Legislative Update 3 1-15-21](#) and [Podcast 3](#) as examples.
- The SAMLN21 participate in weekly Lunch & Legislate web meetings on Monday's in order to enhance effective communication. See [SAMLN21 Lunch & Legislate Agenda 1-11-21](#) and [SAMLN21 Lunch & Legislate Week 1 Recording](#) as examples.
- Weekly [SAMLN21 Lunch & Legislate](#) zoom calls have been held on Monday's at noon with more than 30 SAM members attending each week. The agendas and recordings of each session are on the webpage.
- The [2021 Legislative Session](#) webpage is developed as a comprehensive resource for SAM members to follow the legislative session. Information is updated regularly and uploaded to the [SAM Legislative Update 2021](#) webpage. The most comprehensive report on the status of SAM's advocacy priorities at this time is outlined in [SAMLN21 Legislative Update 10 Transmittal 3-5-21](#) and [Podcast 10](#).
- 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.

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 2019 Legislative Session was created and delivered to members of the SAMLN19. SAMLN19 Webinar training that occurred on 1-3-19 was

[recorded](#) allowing all SAMLN19 members to review the training materials and strategies any time.

- 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](#)
- A similar training for advocacy skill building will be prepared for the 2021 legislative session and provided for the SAMLN21 prior to the beginning of the session in January 2021
- The [SAMLN21](#) webpage is established to provide a central location for all information to be used by the network members. Training for the SAMLN21 was delivered virtually on December 29, 2020 via Zoom and the [Recording](#) of the training is available to all network members.
- [SAMLN21 Legislative Updates and Podcasts](#) are available weekly. See [SAMLN Legislative Update 3 1-15-21](#) and [Podcast 3](#) as examples.
- The SAMLN21 participate in weekly Lunch & Legislate web meetings on Monday’s in order to enhance effective communication. See [SAMLN21 Lunch & Legislate Agenda 1-11-21](#) and [SAMLN21 Lunch & Legislate Week 1 Recording](#) as examples.
- The [2021 Legislative Session](#) webpage is developed as a comprehensive resource for SAM members to follow the legislative session. Information is updated regularly and uploaded to the [SAM Legislative Update 2021](#) webpage. The most comprehensive report on the status of SAM’s advocacy priorities at this time is outlined in [SAMLN21 Legislative Update 10 Transmittal 3-5-21](#) and [Podcast 10](#).
- [SAM Legislative Update 2021](#) webpage houses 18 SAMLN21 Legislative Updates and Podcasts, providing overview and deep dive information weekly throughout the legislative session. This helps build the capacity of SAM members to actively participate in advocacy.

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. The [MT-PEC Flexibility Professional Development Series](#) including a planned syllabus, with desired outcomes driving the content was delivered to our members and archived on the SAM website for future access by SAM members.
- At MCEL 2020, delivered virtually, the MT-PEC partners of MCEL will hold a clinic session targeting advocacy issues coming in the 2021 Legislative Session and the federal and state November election.
- MCEL 2020 was delivered virtually, with a greatly revised program agenda. The SAM Executive Board presented a clinic session on October 15, 2020 titled “[SAM Lessons Learned – Future Focused – SAM Executive Board Panel](#)” that included a look at the SAM advocacy priorities and goals. The clinic session was so highly attended that a followup clinic session was held on November 30, 2020 with the SAM Executive Board presenting and answering questions from attendees.
- Planning for MCEL 2021 includes MT-PEC developing a professional learning series highlighting the use all of the flexibilities and resources enacted into law by legislation in the 2021 session.

- MCEL 2021 will include professional learning sessions highlighting the flexibilities and resources enacted into law by legislation passed during the 2021 session.

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 2019-20](#) 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 2020-21 are included in the [SAM Delegate Assembly 2020 Business Meeting Recommendations 10-14-20](#). 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.
- 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.
- Federal issues and advocacy related to COVID-19 have been updated regularly on the [SAM COVID-19 Information for Schools](#). An example is the [...1/14/21 Update on Coronavirus Relief Act \(CVRA\) approved by Congress on 12/21/20](#). Still waiting on Guidance for implementation. [CVRA Montana District Estimated Funding](#) by school district (we will refer to this as ESSER II funding) will give you an idea of the funds that will flow to your school in a similar manner to the ESSER I funds back in May 2020.
- Federal issues are updated regularly on the SAM [Federal Issues](#) webpage.
- The [2021 Legislative Session](#), federal funding under the CARES II Act and American Rescue Plan Act (ARPA), and [SAM COVID-19 Information for Schools](#) resources for our schools are under consideration by the legislature. These areas will all require ongoing advocacy from our members and professional learning for our members.
- The [COVID-19 Information for Schools](#) webpage resources continue to be updated regularly during 4th Quarter. The resources are filtered to be valuable for administrators.

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.
- SAM has developed a Conference App for each affiliate conference that allows social media communication and pushing of key happenings during meetings and conferences.
- 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) the Association of State Executives (ASE) National Virtual Summer Conference (Executive Director Kirk Miller is the President of ASE for 2020-21), the SAM Virtual Administrators Institute 2020, and the MASS/MCASE Virtual Fall Conference 2020.
- 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.
- Virtual conference and meeting delivery has continued into the 2nd quarter of this year due to the pandemic. The [2021 Montana Virtual Principals Conference](#) is ready to go on January 25-26, 2021.
- 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.
- Virtual delivery of conferences and meetings required the development of expertise in providing great professional learning for SAM members. The SAM office team have continued to refine the virtual opportunities for conferencing and meetings.
- SAM events, meetings and conferences at the end of the 2020-21 and throughout the 2021-22 school year are being planned for blended delivery (both in person and virtual delivery) to allow maximum flexibility for SAM members to participate great professional learning opportunities. Reference the [SAM Week of Excellence](#) (June 9-11, 2021) and the [SAM Administrators Institute 2021](#) (July 26-27, 2021).

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 2019-20 Executive Summary](#) provides specific details of the progress of the 90 SAM LPLP members and 10 Collegial Learning Networks during the 2019-20 school year. This program met the needs of personalized professional learning for about 9% of our SAM members.
- The [SAM Leaders Professional Learning Program \(LPLP\)](#) is a best practices professional learning delivery system that personalizes learning for Montana administrators. Over the past 6 years, SAM LPLP has supported 420 administrators in meeting their personalized professional learning needs.
- In 2019-20, 90 administrators 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! See the [SAM LPLP 2019-20 Executive Summary](#).

- [SAM LPLP 2020-21](#) is underway with 68 administrators registered (10/10/20) and 8 [CLNs](#) collaborative efforts in progress, and the [SAM LPLP Huddle](#) highlighting resources.
- 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 2020-21. This action allowed the formation of a Collegial Learning Network of superintendents new to their position in 2020-21 ([NS CLN](#)) providing increased supports through mentoring, a main benefit of the SAM LPLP. The NS CLN has 27 superintendents participating.
- SAM LPLP 2020-21 has established a New Principal Collegial Learning Network ([NP CLN](#)) with 19 principals participating.
- SAM LPLP 2020-21 has established an Aspiring Superintendent Collegial Learning Network ([AS CLN](#)) with 11 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 2020-21 service to 68 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.
- The [SAM LPLP 2020-21](#) serves 70 SAM members with personalized, coach/mentor based professional learning, and facilitates 8 collegial learning networks (CLN).
- The draft [SAM LPLP 2020-21 Mid Year Executive Summary](#) will be presented to the SAM Board at the 2nd quarter meeting. The progress in the Summary is significant and the data collected assists SAM with ongoing decisions to meet the professional learning needs of SAM members.
- The [SAM LPLP CLN](#) webpage is the location of the collection of the great work being accomplished by the 8 Collegial Learning Networks.
- Monthly the [SAM LPLP Huddle](#) is one-hour virtual discussion between SAM LPLP members, Providers, and the SAM office. Each Huddle features monthly calendar items and resource update, a thought-leader session around a timely topic, and discussion/Q & A. Topics have included School Reopening/COVID Update, Successes and Challenges of School Reopening and Communication Plans, Navigating Title IX Changes, Personnel Issues in the Time of COVID, and Celebrating Successes. The SAM LPLP Huddle on December 10, 2020 with Timely Topic: Let's Celebrate! is an example – [Recording](#).
- During 3rd quarter good participation in SAM LPLP opportunities for participants to engage in mentoring and collegial learning networks. The SAM LPLP Symposium on 2/11/21 was successfully delivered virtually with good participation of our members and the session was recorded for the ongoing use of SAM LPLP members.
- The New Superintendent (NS), Aspiring Superintendent (AS), and New Principal (NP) Collegial Learning Networks (CLNs) are functioning at a high level. Web meetings, thought leader sessions, and collaborative discussion of the members are occurring monthly for each of these CLNs.
- Reference the [SAM LPLP 2020-21 Mid Year Executive Summary](#) for a look at the progress of the SAM LPLP.

- During 4th quarter, ongoing participation of 70 participants in the 2020-21 SAM LPLP continued. The final data collection and surveys to evaluate the SAM LPLP are out to the participants and providers. This data will be used to develop the SAM LPLP 2020-21 Executive Summary to measure the success of the program.

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

- [SAM Needs Assessment 2020 Executive Summary](#) and the [SAM Needs Assessment Data Disaggregated by Affiliate 2020](#) provides information for our association's future professional learning, advocacy and items important to our attention toward.
- SAM Needs Assessment results will be used in the planning of professional development and advocacy opportunities for the 2020-21 school year.
- SAM Needs Assessment results was used in the development and planning of the SAM Virtual Administrators Institute 2020, July 27-28.
- [SAM Virtual Administrators Institute 2020](#) - "Tell Your Story" - School Re-Entry & Recovery After Pandemic Event on July 27-28, 2020 was a success. Until October 31, you can still register and earn up to 15 renewal units for participating in this outstanding Professional Learning. [SAM VAI 2020 Evaluation as of 10-8-20](#) and [SAM VAI 2020 Evaluation as of 10-8-20 Session Evaluations](#).
- [2020 MASS/MCASE Virtual Fall Conference](#) successfully held on September 21-22.
- [MCEL 2020](#) is going Virtual on October 15-16, 2020. [Schedule](#) and [Registration](#).
- [2021 Montana Principals Conference](#) is Virtual, January 25-26 in a format that will be great for professional learning and networking.
- [The 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 reviews and discusses the SAM Needs Assessment 2021 at the January 20, 2021 board meeting.
- The SAM Needs Assessment 2021 results are being used by SAM and affiliate leadership in planning for conferences and meetings in 2021-22.
- The SAM Needs Assessment data and recommendations has been used to develop the SAM Administrators Institute 2021 professional development opportunities.

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 2020-21 1st Quarter Report](#) shows 977 SAM members. This is 8 more than 1st quarter 2019-20, at record levels for 1st quarter, even considering the effects of the pandemic on associations.
- 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.
- [The SAM Membership 2020-21 2nd Quarter Report](#) indicates 1093 members. This is the new record for all-time SAM membership and has happened during the pandemic.
- [The SAM Membership 2020-21 3rd Quarter Report](#) indicates a new record 1102 members!
- Reference the [SAM Membership Report](#) webpage for each annual report.
- The [SAM Membership 2020-21](#) webpage indicates an all time record SAM membership of 1107

- The [SAM Membership 2021-22](#) webpage indicates a first look at the membership drive being at 417 members as of 5-31-21.

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.
- 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.
- The draft [2020-21 SAM Administrative Vacancy Report Executive Summary](#) will be reviewed by the SAM Board at the 2nd quarter board meeting on 1/20/21. The results will be released following that review.
- The [2020-21 SAM Annual Administrative Vacancy Report Executive Summary](#) is complete. This report has been used as recruitment and retention information resource on several bills during the first half of the 2021 legislative session.
- 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 4th quarter 2020-21 report of progress on the SAM Strategic Plan 2018-22 describes outstanding progress of our organization to focus on the established goals during a time of disruption due to the COVID-19 pandemic. Thank you SAM members for your attention and contributions to the successful implementation of the SAM Strategic Plan, and more importantly, for your great work you have done every day to create a safe, healthy education environment for your students!

Respectfully submitted,



Kirk J. Miller
SAM Executive Director