

*Executive Director's Report to the SAM Board of Directors  
1st Quarter 2017-18 Strategic Plan Update  
October 19, 2017*



The [SAM Strategic Plan](#) 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...

1. Professionalism, Integrity and Leadership
2. Advocacy
3. Professional Learning and Services

### **Noted Progress on our Strategic Plan Goals for 2014-18:**

- This section of the report is intended to summarize what your staff (Patrick, Gary, Kim and I), 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 Objective in the Strategic Plan.
- 1<sup>st</sup> Quarter updates are added using black text
- 2<sup>nd</sup> Quarter updates will be added using green text
- 3<sup>rd</sup> Quarter updates will be added using blue text
- 4<sup>th</sup> Quarter updates will be added using purple text

### **Goals and Strategic Objectives**

- 1. Professionalism, Integrity, and Leadership:** SAM models and promotes the highest levels of professionalism, integrity and leadership of its affiliates to create a foundation vital to success.

#### 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.
  - SAM consistently requests that our members participate actively in all efforts (committees, task force, study groups, commissions, etc.) impacting the education of children in Montana.
  - SAM's participation with integrity with our education stakeholders in [MT-PEC](#), the Governor's office, State Superintendent's office, Montana University System, Montana Congressional Delegation, and other professional groups and advocacy groups, has provided SAM a seat at the table when discussing important educational issues.
  - SAM and affiliates have worked to build relationships with the new State Superintendent and the new team at OPI during the transition of the office following the November election.
- 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.
  - SAM's contributions to the work of the legislative [Interim Education Committee](#), [RISE4MT](#), [MUS Rural Educator Recruitment and Retention Task Force](#), the Zogby poll 2017, and production of the *GREAT V* publication are prime examples of creating useful partnerships and tools for our members, keeping fairness, honesty and respect for all involved.
  - Focus attention on indicators of outstanding comprehensive education and high performance in Montana's schools as described in *GREAT V*.
  - Focus attention on the value our public schools bring to each community as described in *GREAT V*.
  - 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!

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

- In 2017-18, SAM members have established a strong voice by participating on: [Montana ESSA Plan](#), [Suicide Prevention](#), PK-12 School Funding Adequacy and Equity, K-12 Vision Group, [Interim Education Committee](#) Priorities, [Preschool](#), [Montana EPAS](#) (Educator Performance Appraisal System), [Montana Afterschool Alliance](#), [Montana Farm to School Leadership Team](#), [Broadband Access Initiatives](#), [EducationSuperHighway](#), Study of Special Education Funding and Services ([HJ 1](#) 2017 legislative session), Recruitment and Retention of Quality Educators ([RISE4MT](#), [MUS Rural Educator Recruitment and Retention Task Force](#), and others), Montana Multi-tiered System of Supports (MTSS) Workgroup, Montana CSPD Stakeholder Group, and [Montana Digital Academy](#) to name a few!
- [SAM Delegate Assembly](#) and the SAM Legislative Network are functioning effectively in training and advocating for issues important to Montana's schools.
- SAM offers professional learning opportunities for our members through the [SAM Leaders Professional Learning Program](#) (LPLP), regional affiliate meetings, conferences, a website pointing to resources available to members, social media through [#SAMedchat](#) weekly Twitter chat, and SAM's Facebook page.
- The SAM Leaders Professional Learning Program 2017-18 has been restructured and a new partnership developed with the Montana University System (Title II grant with MSU) is in place.
- Affiliate leadership is organizing conference themes and agendas using priorities established by the SAM Needs Assessment 2017 and the data from the SAM LPLP 2016-17.
- Advocacy during the 65<sup>th</sup> Legislative Session was clearly an all-hands-on-deck effort of SAM members. Federal advocacy has been a focus during the 1st quarter.
- Through policy development, the SAM Investment/Finance Committee (SAM officers and Affiliate Presidents) has been meeting on a regular schedule to review the financial well-being of SAM and its affiliates. The Committee reports to the SAM Board of Directors quarterly.

1.4 SAM models these traits through advocacy at the local, state, and national levels.

- 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.
- SAM members are cooperating with partners in the development of initiatives, committees, and task force listed in Strategic Objective 1.3.
- SAM and META developed a Montana CoSN (Consortium of School Networking) State Chapter that allows all SAM members to use and participate in the resources developed by this national organization.
- [Federal Issues](#) (can be reviewed on the SAM website) related to the proposed FY 18 federal budget, the impact of proposed changes to the Health Care Act on Montana schools, and ESSA planning for Montana have been a focus in the 1<sup>st</sup> quarter of 2017-18.

**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 maintain a united front with MT-PEC by SAM participation in MT-PEC meetings and communication to members through weekly SAM Update E-mail.

- Collaboration between education associations (MASBO, MEA-MFT, MQEC, MREA, MTSBA, SAM) formed the Montana Public Education Center ([MT-PEC](#)) creating a strong voice on education policy issues and impacting advocacy at the state (legislature, administration and rule making) and federal level.
- [SAM Delegate Assembly](#) and the SAM Legislative Network are functioning effectively in training and advocating for issues important to Montana's schools.

- Assisted in the Zobgy Poll 2017 revealing Montanan’s support for their public schools. Helped create “*The Great Work of Montana’s Public Schools, Volume 5 (GREAT V)*”, released at MCEL 2017 and intended to help all administrators and the education community with talking points to be used to support public education in our state.
- SAM has informed the membership of advocacy work throughout the year using the weekly digital SAM Update and the SAM Bulletin.
- SAM members and Executive Director participated in the [K-12 Vision Group](#) work (August 21, 2017) developing the 2017-18 strategic plan. This work is considered during the SAM Delegate Assembly for incorporation into positions and resolutions of the organization.
- SAM office team are key contributors to [MT-PEC](#) strategies and [Issue Spotlights](#) written to assist administrators, trustees, business officials and teachers support of educational issues.

2.2 SAM will utilize the Steering Committee that includes one person from each SAM affiliate to identify current educational issues.

- The role of the [DA Steering Committee](#) is being implemented with fidelity as outlined in the SAM Bylaws and is beginning year 5 of full operation.
- The Steering Committee is called upon for consideration of advocacy issues both in the process used for advocacy and for immediate concerns.
- The Steering Committee met on October 3, 2017 to review the actions of the Delegate Assembly in preparation for the SAM Board Meeting (October 19, 2017) and the Annual SAM Business Meeting (on October 19, 2017).
- The Steering Committee is accomplishing a great deal in helping our entire membership understand and take action on SAM’s advocacy priorities.

2.3 SAM will provide quality resources that contain current educational facts and implications to all stakeholders.

- [SAM Delegate Assembly](#) has developed a long range understanding of Positions and Resolutions creating an action plan for advocacy at the state and federal level.
- SAM utilizes the [SAM Legislative Network](#) to provide effective communication on state and federal issues with legislators and our congressmen.
- [Advocacy Issues 2017-18](#) webpage provides SAM members with up to date background on advocacy issues.
- [SAM Delegate Assembly 2017 Business Meeting Recommendations](#) are developed for action of the SAM membership to set SAM’s advocacy priorities for the 2017-18. The SAM Business meeting is October 19, 2017.
- SAM participated with [MT-PEC](#) creating [Issue Spotlights](#) on education Advocacy issues at the state and federal level.
- Focus on [SAM Advocacy Priorities](#):
  - Support Adequate and Equitable School Funding
  - Support Recruitment and Retention of Quality Educators
  - Oppose Privatization with Public Funds
  - Support Facility and Technology Infrastructure
  - Support School Based Mental Health Services
- SAM members’ leadership and participation in the development of the [MT ESSA Consolidated State Plan](#) for implementation of the Every Student Succeeds Act (ESSA) was submitted to USED on September 14, 2017. SAM has developed the [ESSA Implementation](#) webpage to assist our members with up to date information about ESSA. [ESSA Montana Plan 2017 School Administrators - Leadership and Support for your District](#) was developed to look specifically at supporting administrators’ implementation of ESSA in their school district.
- SAM is working closely with partners in the education community on challenges in the implementation of the SB 410 Tuition Tax Credit bill (2015 legislative session) in association with the MQEC.

2.3.1 Federal relations leaders of each affiliate will collaborate to develop the SAM federal advocacy package.

- [Federal Advocacy](#) for the implementation of [ESSA](#), support of the increased funding of IDEA, led the charge with Montana's congressional delegation and national associations to request USED address the burden created in completing the Civil Rights Data Collection (CRDC) biannual report and the Rural Schools REAP funding application. SAM continues to advocate for E-Rate and Broadband access for schools, Medicaid and American Health Care Act actions, and the REST Act and NEST Act rural educator recruitment legislation.
- [SAM Federal Advocacy Priorities w Positions 2017-18](#) are SAM's statements of support for federal issues.
- SAM Advocacy [Federal Issues](#) web page is kept current with a number of federal issues impacting schools, including ESSA, Educator Recruitment and Retention, E-Rate and Broadband Access, CRDC, Federal Budget and Appropriations, and IDEA Reauthorization and Funding.
- SAM affiliate national associations – AASA, NASSP, NAESP and NREA (MACSS actively involved in NREA) – provide significant training on federal advocacy. All SAM affiliates have participants in advocacy efforts at the federal level. These national affiliates are also providing resources/training to assist state affiliates with advocacy issues and SAM affiliate members have participated in this work.

2.4 SAM will provide quality opportunities to learn about the resources available and training that leads to active advocacy.

- The effort of the [SAM Legislative Network 2017](#) contributed greatly to a successful 2017 legislative session for K-12 education.
- [SAM 2017 Legislative Session Summary](#) describes the progress on the SAM Legislative Priorities accomplished during the 2017 session. [SAM Bills Status by Priority Final Report](#) describes SAM's role in the 65<sup>th</sup> Legislative Session. [SAM Legislative Updates 2017 Session](#) webpage was developed to describe the work accomplished during the session.
- SAM has helped establish [MCEL 2017](#) – Expect the release of the *GREAT V* publication for all schools and communities to have common advocacy information about the great work (based on the recent Zogby poll of Montana citizens) being accomplished in our public schools.
- SAM continues to use the SAM Legislative Network for implementing SAM's advocacy priorities on state and federal issues arising throughout the year.
- SAM affiliate national associations – AASA, NASSP, NAESP and NREA (MACSS actively involved in NREA) – provide significant training on federal advocacy. All SAM affiliates have participants in advocacy efforts at the federal level. These national affiliates are also providing resources/training to assist state affiliates with advocacy issues and SAM affiliate members have participated in this work.

2.5 SAM will research structure and staffing necessary to accomplish the advocacy goals.

- The SAM office structure is working well. The abilities and contributions of Pat Audet, Gary Wagner and Kim Scofield are outstanding. This team all play a role in accomplishing our advocacy goals.
- The SAM Delegate Assembly Steering Committee supports and recommends continuing use of the SAM Legislative Network as the structure to advocate for priorities at the local, state and federal levels.
- SAM is now operating with new association management software, including a database (MemberClicks) leading to revision to the SAM website, membership drive, conference materials/registration and communications efforts. SAM's office team continues to implement the powerful tools available. The membership drive is digital for 2017-18 and conference registrations have been streamlined digitally to better meet the needs of our members. SAM's list serves have been modernized and development of Community forums (blog features) for affiliates and topics of importance to SAM members so they can communicate effectively on topics of interest.
- The SAM office team members are highly effective and efficient in delivering value added opportunities and member benefits.

- 3. Professional Learning and Services:** SAM will extend and expand the professional learning delivery system using the expertise of the SAM affiliates, as well as other service providers through professional development, mentorship, and other member services.

Strategic Objectives:

3.1 Professional Development

Provide professional development using social media

- 3.1.1 Montana Ed Chat on Twitter (#MTedchat) – Professional learning service and SAM Ed Chat ([#SAMedchat](#)) on Twitter – for administrators every other Tuesday from 7:00-8:00 followed by #MTedchat from 8:00-9:00
- Communicated the development of SAM Twitter presence and Facebook presence through the SAM Updates and SAM Bulletins during 1st Quarter.
  - SAM office team participates in the #MTedchat on Tuesdays.
  - Developed @MTEDLeadership SAM twitter presence for use at conferences and sharing information with SAM members and the greater education community.
  - Continued use of @MTEDLeadership twitter presence is expanding.
  - Used hashtag -- #samai17 -- during the SAM Administrators Institute 2017 in July to promote communication during the conference.
  - [#SAMedchat](#) is developed, underway, and takes place every other Tuesday from 7:00 – 8:00 pm for all administrators and other educators who wish to join. Check out the webpage to see training on “How to #SAMedchat”, review the transcript of past #SAMedchats and the schedule of upcoming #SAMedchats! Weekly topics are facilitated by SAM members and communicated on the SAM website under ‘Headlines’ and ‘#SAMedchat’, in the SAM Bulletin, and weekly SAM Updates.
  - Affiliate conferences are including the use of the SAM twitter presence to communicate during conferences and also to provide resources for administrators.
- 3.1.2 ED Camp – professional development provided to workshop attendees; defining SAM’s role.
- [ED Camp strategies](#) have proven successful at affiliate conferences in 2016-17. The [SAM Administrators Institute 2017](#) Instructional Leadership Summit held a Social Media Ed Camp facilitated by Jon Konen and Todd Lark. This form of professional learning is being embraced by SAM members and Montana educators.
  - Continuing promotion of using ED Camp strategies with affiliates in order to increase communication on important issues for education in Montana.
- 3.1.3 Technology Professional Development – work with SAM members on social media and technology
- [SAM Administrators Institute 2017](#) incorporated a ‘Leadership and Technology’ Focus Zone with META affiliate members and personalized learning experts presenting on a number of educational technology topics. A Social Media Lounge Focus Zone provided opportunities for conference attendees to learn about social media.
  - Continued promotion with affiliate leadership for using technology strands during professional learning opportunities at conferences and meetings.
  - META has developed Tech Talks in regions to discuss educational technology topics and made this available for all administrators.
  - The new SAM website and new association management software (MemberClicks) allows the formation of Committees (blogs) for topical discussion boards on any affiliate priority or state-wide education priority. The website allows easy member login access to the Committees any individual SAM members wishes to access.

- Full application of connecting the SAM webpage to Facebook and Twitter are part of the MemberClicks, association management software, strategies SAM will implement ongoing.

### 3.2 Mentorship

#### 3.2.1 Extend the SAM mentor program

- [SAM LPLP 2016-17](#) ended the year with successful participation of 34 Montana administrators. [SAM LPLP 2016-17 Executive Summary](#) describes the great progress made.
- [SAM LPLP 2017-18](#) is underway. The SAM Executive Board approved moving forward with establishing the SAM LPLP 2017-18 with changes to clearly establish this professional development delivery system that is personalized to meet the needs of administrators interested in enhancing their leadership and improve their work for students.
- Further outreach to the Montana University System led to a Title II grant partnership between the MSU Education Department and SAM LPLP to provide induction and coach/mentoring to MSU graduates of the Educational Leadership Program working in Montana districts throughout the state. The analysis of data collected will be enhanced by the grant. The grant will serve as a model example of continued expansion of personalized learning for all Montana administrators.
- The [SAM Leaders Professional Learning Program \(LPLP\)](#) is a best practices professional learning delivery system that personalizes learning for Montana administrators. Four years of developing this delivery system has led to 66 administrators in the 2017-18 program working in Collegial Learning Networks with coach/mentors to personalize a professional learning plan that will enhance their ability to serve their students, school and community!

#### 3.2.2 Track the number of new members that participate in the SAM mentor program and other learning opportunities provided by SAM or affiliates

- SAM has successfully collected significant data on the 34 participants in the [SAM LPLP 2016-17](#). The [SAM LPLP 2016-17 Data Collection Report](#) describes the value of the program for Mentees, Mentors, and 21 CLI Members and their Coaches. The data also describes the ongoing professional learning and training efforts to improve student learning that are happening all across the state of Montana. The [SAM LPLP 2016-17 Executive Summary](#) describes the value of the program to participants and reveals that it is helpful for Montana administrators in retaining the position in which they serve in their school district.
- [SAM LPLP 2017-18](#) has 66 participants ([members](#)) who have formed 7 Collegial Learning Networks (CLN) intended to collaborate together studying key educational issues impacting student learning in our schools.
- SAM LPLP Providers and Program Directors attended the LPLP Provider Symposium ([agenda](#)) on 6/13/17 to train together to launch the SAM LPLP 2017-18.
- 29 participants attended the [SAM LPLP Summit 2017](#) ([agenda](#)) on 7/31/17, and were joined by 9 role alike facilitators and 4 LPLP Providers and Program Directors. All participants have been invited to attend MCEL 2017 Clinic Session II for a review of the first 100 days, facilitated by Godfrey Saunders and Tom Unwin, SAM LPLP Program Directors.
- [SAM LPLP 2017-18 Data Collection 1<sup>st</sup> Quarter](#) indicates 233 entries during 1st Quarter in communication with the 66 members, amounting to over 436 hours of members' effort for their schools.
- Working to develop funding streams to make the SAM LPLP self-sustaining, we have identified nearly \$100,000 in contributions to support the 2017-18 program. You can review the financial status of the program at [SAM LPLP Historical Profit-Loss](#).
- The cost of the program is set consistently at \$500 per participant and the outreach to all Montana administrators to have them join in this program has been underway since April.

#### 3.2.3 Continue Needs Assessment Survey of membership to gain insight into satisfaction and needs

- The SAM Needs Assessment Survey 2018 will be created digitally for distribution in December with data collected and reviewed in January. Continued use of the SAM Needs

Assessment Survey will assist the SAM Board and affiliates with establishing meaningful professional learning opportunities and member services.

### 3.3 Membership

#### 3.3.1 Maintain stability with membership while administrative positions are cut

- The 2017-18 membership drive was launched on April 3, 2017 using new MemberClicks association management software to enhance our ability to develop membership and interface with our business operation making it easy for our members to continue their membership and for new members to join our team.
- [SAM Membership Report 1<sup>st</sup> Quarter 2017-18](#) shows continued stability in the membership numbers at 934 as of September 30, 2016. This is 26 less than 1<sup>st</sup> Quarter 2016-17. SAM is implementing the new digital system for membership (MemberClicks) and we are pleased that our membership has remained at close to record levels while making this conversion.
- SAM Associate Director is working with affiliate regional directors to follow up with individual potential members and school districts who have potential members.
- Using Google technologies to develop easily accessible lists to be used for recruiting and retaining SAM members.

#### 3.3.2 Maintain current services while implementing new social media services

- [SAM Administrators Institute 2017](#), “Leadership of Transformational Change & Personalized Learning to Impact the Whole Child”, provided great learning opportunities for our entire membership, showcasing transformational change for personalizing education, social emotional learning education issues and raising awareness of the use of social media services; receiving very favorable feedback on evaluations of the Institute.
- Focus on [SAM LPLP 2017-18](#) by reviewing training for program Providers, marketing the program to members, launching the 2017-18 SAM LPLP, and seeking support for the program from the business community, university system, OPI and state administration.
- In September, the [META Board Strategic Planning Retreat](#), [MASS/MCASE Fall Conference 2017](#), and [MACSS Fall Conference 2017](#) were successful with good numbers of attendees and favorable feedback on evaluations.
- [MCEL 2017](#) – Expect the release of the *GREAT V* publication for all schools and communities to have common advocacy information about the great work (based on the recent Zogby poll of Montana citizens) being accomplished in our public schools. Plans are complete to renew and develop an outstanding [MCEL 2017](#) (October 18-20, 2017). The venue is moved to downtown Billings at the Northern Hotel and Double Tree Hotel. Innovative technology and general session speakers will invigorate and motivate our Montana education leaders!
- SAM is cooperating with the principal associations in Wyoming, North Dakota and South Dakota as well as NAESP and NASSP to offer Montana administrators the opportunity to network with their colleagues in nearby states at the Mountain States Conference 2016. Click [HERE](#) to review and register for this opportunity in Deadwood, SD on November 6-8.
- SAM office continues to enhance the [SAM website](#) as a place for members to go to keep current on issues and seek professional learning around the great number of topics. SAM webpages are continually updated to provide members and interested parties with contemporary information about SAM and our efforts in leadership, professional learning and advocacy!
- SAM Associate Director has developed a Google sheet for each affiliate region showing current members and potential members. Affiliate leadership has used the Google sheet to make contacts to potential members moving us closer to the SAM membership goals.
- SAM is using the [Conference](#) webpage to keep our members informed about all of the resources and materials developed at each conference throughout the year.
- Each conference in 2017-18 will develop a twitter presence with ongoing dialogue being displayed at the conference registration table.

- [#SAMedchat](#) is developed, underway, and takes place every other Tuesday from 7:00 – 8:00 pm for all administrators and other educators who wish to join. Check out the webpage to see training on “How to #SAMedchat”, review the transcript of past #SAMedchats and the schedule of upcoming #SAMedchats!
- Follow SAM on Twitter - @MTEDLeadership.
- The MemberClicks software allows review of emails opened and clicks on links for those opening emails. Facebook and Twitter allow usage reports. In all cases, we are seeing increased use of the tools developed and social media by our members. The analysis of this data will provide insight for enhancing the use of social media tools to benefit our members in the coming year.
- MemberClicks software has enhanced our [www.sammt.org](http://www.sammt.org) website by providing security and password protected webpages that allow members access to the information they need by login to their member profile.
- Contemporary Issues discussed with membership during 2017-18 1<sup>st</sup> Quarter include:
  - State Revenue Shortfall and the Impact on Montana Schools – SAM [Advocacy Issues 2017-18](#)
  - [SAM Delegate Assembly 2017 Business Meeting Recommendations \(no mark up\) 10-19-17](#)
  - Recruitment and Retention of Quality Educators Update
    - [RISE4MT Update](#)
    - [MUS Rural Educator Recruitment and Retention Task Force](#)
  - Montana [ESSA Implementation](#)
  - Student Mental Health Issues, Emergency Planning, and [Suicide Prevention](#)
  - Montana Information Security Project
  - [Montana School Broadband Project](#)
  - [SAM LPLP 2017-18](#)
  - [MCEL 2017](#) – Release of GREAT Montana Schools – Zogby Survey
  - [Montana Principals Conference 2018](#) – April 4-6 at Fairmont – Joint effort of MASSP and MAEMSP

Thanks SAM board members and all affiliate members for your leadership to accomplish the goals of the SAM Strategic Plan 2014-18 during 2017-18. Great progress on the SAM Strategic Plan results from the focus and the effort of our members to make a positive difference for the students of Montana!

Respectfully submitted,



Kirk J. Miller  
Executive Director