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

- This section of the report is intended to summarize what your staff (Patrick, Gary 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 using the 3 goals in the strategic plan.
- 1st Quarter updates are added using black text
- 2nd Quarter updates are added using green text
- 3rd Quarter updates will be added using blue text
- 4th 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’s Delegate Assembly work to review in depth, the content and practices of SAM’s resolutions and positions, is a shining example of encouraging the characteristics outlined.
   - 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 will encourage participation of SAM members in the development of Montana’s Every Student Succeeds Act (ESSA – December 2015 reauthorization of the Elementary and Secondary Education Act) accountability workbook plan. The state superintendent is responsible for developing the plan and we will encourage professionalism, integrity and leadership of Montana administrators during the development process.
   - SAM will encourage leadership in the process developed by challenges to the Department of Revenue rules on SB 410 Tuition Tax Credit bill, insuring that the intent of Montana’s Constitution to make no payment or appropriation of public funds for private religious education (Article 5 and 10).

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 Zogby poll 2015 and production of GREAT III is a prime example of creating a useful tool for our members keeping fairness, honesty and respect for all involved.
   - Indicators of outstanding comprehensive education and high performance in Montana’s schools.
   - Focus attention on the value our public schools bring to each community.
   - 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 will use the results of the SAM Needs Assessment Survey 2016 to develop professional learning, advocacy, and services for the ensuing year. SAM Board to review the survey results in January 2016.

1.3 SAM enlists and guides the talents and energies of its membership towards promoting the goals of the organization.
• Active participation by SAM members in research and implementation of 2015 legislative actions and other study groups impacting education – HB 374 Suicide Prevention Workgroup, Special Ed Coop Funding Coop Task Force, Montana Afterschool Alliance, CEEDAR State Leadership Team, Montana Arts Content Standards Committee, Montana Health Enhancement Content Standards Committee, Montana Oil and Gas Funding Study Committee, Montana Science Content Standards Committee, Montana Farm 2 School Task Force, Montana Early Childhood Education, and others.
• Participation and leadership of Montana school and district administrators in the development of the ESSA Accountability Workbook plan to support the right approach for Montana students.
• Participation and leadership of Montana school and district administrators in the support of Montana’s Constitutional intent given challenges created by the rule making process for SB 410 Tuition Tax Credits.
• SAM will continue participation in the development of Broadband access for schools through membership and leadership on the K-12 Connectivity Workgroup – META President and Executive Director are members of the Workgroup.

1.4 SAM models these traits through advocacy at the local, state, and national levels.
• SAM is a leading advocate for Montana administrators though 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 the Montana Educator Performance Appraisal System (EPAS), EducationSuperHighway Broadband Access Initiative, AdvancED, FCC Chairman Wheeler visit to Montana on October 13, 2015.
• SAM Legislative Network was instrumental in the support and passage of S. 1177 Every Student Succeeds Act (ESSA), providing our congressional delegation with information about the value or passing this bill for Montana schools.
• SAM Legislative Network was instrumental in providing information to request the Office of Civil Rights create a Civil Rights Data Collection (CRDC) report that is manageable and worthwhile for Montana’s Schools. Both Montana Senators wrote to the OCR to make a request for changes at our urging.
• SAM will continue participation in expanding broadband access to Montana schools through active participation on Montana’s K-12 Connectivity Workgroup.

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 positive impact in the 2015 legislative session and strong voice on education policy issues.
• Assisted in the Zogy Poll revealing Montanans’s support for their public schools. Helped created the “Essential Truths About the Great Work of Montana’s Pubic Schools, Volume 3”, released at MCEL 2015 and intended to help all administrators and the education community with talking points to be used throughout the 2017 Legislative Session.
• **GREAT III** was published and released at MCEL 2015. A mailing was made to all administrators in Montana to promote the use of this data filled publication to assist in local advocacy efforts. A [VIDEO](#) was created to launch the release of GREAT III at MCEL 2015.

• SAM has communicated and worked closely with MT-PEC and MQEC on the matters related to SB 410 Tuition Tax Credits.

• SAM has communicated and worked closely with MT-PEC on the matters related to RISE4MT.

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

• Fully operational through the 2015-16 year and continues its effectiveness in 2015-16.

• The Steering Committee members are entering their 3rd year and are assisting in the transition to new Committee members this year.

• The Steering Committee is called upon for consideration of advocacy issues of immediate concern. An example in September 2015 was a rally of the SAM Legislative Network to encourage the Montana Public Service Commission to certify Montana’s telecommunications providers.

• The Steering Committee met on December 11, 2015 reviewing and making recommendations to the SAM Board for appointment of Steering Committee members, Bylaw changes to align with practice, communications for affiliates about Delegate Assembly 2016, and initial review of Delegate Assembly 2016 positions and resolutions submissions.

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 participated with MT-PEC creating [Issues Spotlights](#) on education Advocacy issues at the state and federal level.

• [School Funding Interim Commission (SFIC)](#) – Communicating with Commission members offering support for the work ahead. First meeting on September 23, 2015.

• Executive Director and Associate Director are making presentations of contemporary issues related to SAM at regional affiliate meetings and at affiliate conferences. Click [HERE](#) to review presentations that are being made. These presentations are intended to assist SAM members in understanding the major issues impacting schools and students, and SAM’s role and contributions related to the issues.

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

• Through consensus of the federal relations officers of the SAM affiliate organizations, a document was created July 2014, revised in 2015 and being used by each affiliate meeting with the Montana Congressional Delegation.

• Click [HERE](#) to review SAM’s statements of support for federal issues.

• SAM advocated with MT-PEC to prepare an issues spotlight on [Reauthorization of ESEA](#) during the spring of 2015. SAM used this information in our work with the Montana congressional delegation.

• [Federal advocacy](#) for the reauthorization of ESEA, support of the BOLD flexibility in the IDEA act, leading the charge with Montana’s congressional delegation and national associations to request Congress to address the burden created in completing the Civil Rights Data Collection biannual report.

• SAM also advocated for the Montana Public Service Commission to support the certification of Montana’s Telecommunications Providers – significant impact of federal funds coming to Montana to support digital infrastructure, E-Rate and schools.

• SAM participated in FCC Chairman Wheeler’s visit to Montana schools in October 2015.
SAM Legislative Network was instrumental in the support and passage of S. 1177 Every Student Succeeds Act (ESSA), providing our congressional delegation with information about the value or passing this bill for Montana schools.

SAM Legislative Network was instrumental in providing information to request the Office of Civil Rights create a Civil Rights Data Collection (CRDC) report that is manageable and worthwhile for Montana’s Schools. Both Montana Senators wrote to the OCR to make a request for changes at our urging.

SAM Advocacy Federal Issues web page is kept current with a number of federal issues impacting schools, including ESSA, E-Rate, CRDC, Federal Budget and Appropriations.

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 2015 contributed greatly to a successful 2015 legislative session for K-12 education. Click [SAM 2015 Legislative Session Summary](#) to review the progress on the SAM Legislative Priorities. Click [Final Status Reports – 2015 Legislative Session](#) to access reports that tell the story of SAM’s role in the 64th Legislative Session.
- Working closely with the K-12 Vision Group and MT-PEC to establish areas of focus for the 2017 legislative session and education advocacy issues.
- Focus on SAM and MT-PEC priorities and development of resources and training for:
  - Recruitment and Retention of Quality Educators ([Rise4Montana](#))
  - Capital Facilities/Technology Infrastructure Needs
  - Special Education Funding Adequacy and Equity
- SAM has helped establish [MCEL 2015](#) – Expect the release of the GREAT III 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.
- GREAT III was published and released at MCEL 2015. A mailing was made to all administrators in Montana to promote the use of this data filled publication to assist in local advocacy efforts. A [VIDEO](#) was created to launch the release of GREAT III at MCEL 2015.
- SAM continues to work and lead the development of Montana’s quality educator recruitment and retention effort (RISE4MT). This is a key issue in the SAM advocacy priorities. SAM helped to develop a research model and is seeking experts to assist in the research necessary for Montana.
- SAM has participated with the Legislative Services Division leadership in creating legislative presentations on the status of Capital Facility Needs in our schools. Presentations will be made to the Finance Interim Committee and the School Funding Interim Commission.
- MCASE and SAM leadership have worked with the OPI leadership through the Special Education Coop Funding Advisory Group to develop strategies for Special Education Funding. Presentations will be made for the School Funding Interim Commission at their meeting in January 2016.
- Executive Director and Associate Director are making presentations of contemporary issues related to SAM at regional affiliate meetings and at affiliate conferences. Click [HERE](#) to review presentations that are being made. These presentations are intended to assist SAM members in understanding the major issues impacting schools and students, and SAM’s role and contributions related to the issues.

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

- The SAM office structure is working well. The ability of Pat Audet and Gary Wagner has been outstanding. Our team is coming together under this new structure.
- We have been unable to hire an Office Assistant/Communications Specialist position. The part-time (20 hours a week) and salary ($13 per) has been advertised with a number of applications. We have conducted 2 interviews and determined the fit was not best for our needs at SAM. We will continue to seek a qualified applicant to come on board and assist our team.
- Hired Communications Specialist, Kimberly Scofield to join the SAM team part-time beginning on January 4, 2016.
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 Professional Development

**Provide professional development using social media**

3.1.1 **Montana Ed Chat on Twitter – Professional learning service OR SAM Ed Chat on Twitter** — administrators got together once a week — track the number of -- Tuesday from 7-8 -- #MTedchat

- Communicated the development of SAM Twitter presence and Facebook presence through the SAM Updates during 1st Quarter.
- SAM office team is participating in the #MTedchat on Tuesdays.
- Developed @MTEDLeadership SAM twitter presence for use at conferences and sharing information with SAM members and the great education community.
- Continued use of @MTEDLeadership twitter presence is expanding.
- Used the hashtag -- #samai15 -- during the SAM Administrators Institute 2015 in July to promote communication during the conference.
- 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.**

- Mini Ed Camp concept was implemented with great success at the MASSP Spring Conference 2015. MASSP President, Paul Furthmyre organized the Mini Ed Camps and the conference evaluations rated this effort as one of the best at the conference.
- Prepared Technology Focus Zone presentations for the SAM Administrators Institute 2015 Instructional Leadership Summit (July 29), successfully defining SAM’s role in ED Camp professional development.
- Continued 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 2015](#) incorporated a Technology Focus Zone with META affiliate members and Social Media experts presenting on a great number of topics. The Institute “Internet Café” concept provided an opportunity for short sessions on using social media effectively for education. The short sessions, led by Montana technology education experts were well attended and highly rated by Institute attendees.
- 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.

3.2 Mentorship

3.2.1 **Extend the SAM mentor program**

- The lessons learned from the 2013-14 SAM Mentor Program and 21st Century Leadership Institute (21 CLI) Program; SAM created the Leaders Professional Learning Program (LPLP)
2014-15. With the support of the SAM Board the LPLP 2015-16 is underway with the 49 LPLP participants (33 Mentees, 16 21 CLI Members).
- Focus on SAM LPLP 2015-16 by training program Providers, marketing the program to members, launching the 2015-16 SAM LPLP, and seeking support for the program from the business community, university system, OPI and state administration.
- SAM LPLP 2015-16 now has 52 participants (36 Mentees, 16 21 CLI Members).
- SAM has garnered further financial support for the SAM LPLP 2015-16 from NorthWestern Energy. We have a meeting with the Montana Chamber Foundation Board of Directors on January 12, 2016.

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 LPLP Data Collection tool (using Google Apps) was put in place from the very beginning of the SAM LPLP 2015-16. Providers are collecting data regularly in their work with their proteges and 21 CLI members. At the end of 1st Quarter, Providers had made over 180 contacts with the 49 LPLP participants (33 Mentees, 16 21 CLI Members).
- 45 new leaders attended the SAM Administrators Institute 2015 New Leaders Summit and were joined by 14 role alike facilitators and 7 LPLP Providers. All have been invited to attend MCEL 2015 Clinic Session II for a review of the first 100 days, facilitated by Godfrey Saunders, SAM LPLP Mentor Program Director.
- SAM LPLP 2015-16 now has 52 participants (36 Mentees, 16 21 CLI Members).
- SAM LPLP Data Collection tool indicates over 450 entries through 2nd Quarter in communication with the 52 participants.
- Development of a continuous improvement process for 21 CLI (Plan, Do, Check, Act – PDCA) has cohort teams focused on making progress to improve learning for students in bite sized, accomplishable chunks that lead to planning for the next steps. Great positive feedback from the 21 CLI members on the PDCA cycle.
- SAM LPLP 2015-16 Mentor Program and 21 CLI Symposiums (January 18-19) are prepared to provide participants with a rich face-to-face professional learning.
- The SAM LPLP 2015-16 Mid-Year Report is being prepared.

3.2.3 Continue Needs Assessment Survey of membership to gain insight in satisfaction and needs
- The SAM Needs Assessment Survey 2016 will be created digitally for distribution in December with data collected and reviewed in January.
- SAM will use the results of the SAM Needs Assessment Survey 2016 (Due January 9, 2016) to develop professional learning, advocacy, and services for the ensuing year. SAM Board to review the survey results in January 2016.

3.3 Membership
3.3.1 Maintain stability with membership while administrative positions are cut
- SAM Membership Report 1st Quarter 2015-16 shows continued stability in the membership numbers.
- SAM Associate Director is working with affiliate regional directors to follow up with individual potential members, school districts who have potential members.
- SAM Membership Report 2nd Quarter 2015-16 at 974 total members, shows we have nearly reached the total membership last year (978) and are continuing to communicate individually with potential members who have yet to become members.
3.3.2 Maintain current services while implementing new social media services

- **SAM Administrators Institute 2015** provided great learning opportunities for over 150 members – theme was “Finding clarity amid the fog of external demands.” SAM Administrators Institute 2015 was highly successful for showcasing contemporary 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 2015-16** by training program Providers, marketing the program to members, launching the 2015-16 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 Fall Conference** and **MCASE Fall Conference** were successful, with good numbers of attendees and favorable feedback on evaluations.

- **MCEL 2015** – Expect the release of the **GREAT III** 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 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 2015. Click [HERE](#) to review and register for this opportunity in Deadwood, SD on November 8-10.

- 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 they are responsible for.

- **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.

Thanks to all for your effort during the 1st Quarter of the 2015-16 school year!

Respectfully submitted,

Kirk J. Miller
Executive Director