

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.
- 1st Quarter updates are added using black text
- 2nd Quarter updates will be added using green text. [SAM Board Strategic Plan Review Update 10/19/16](#)
- 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 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 Board review of the strategic plan using the knowledge-based questions on 10/19/16 \(see separate document\)](#) described continuing to develop the strategic plan, holding ourselves accountable, being proactive with our stance on issues, being fiscally transparent, being able to defend positions, being consistent in the communication, as actions required to accomplish this objective.
 - 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. Superintendent Arntzen has presented at the MAEMSP Winter Conference 2017 by invitation and also at the MASS Spring Board Meeting as well as the MT-PEC Caucus Day and the MT-PEC Day of Advocacy. SAM has been integral in assisting the new superintendent in meeting with our administrator's association leaders. This is a part of our organizations' values.
 - SAM and affiliates focus on advocacy during 3rd and 4th quarters encouraged integrity by being open, honest, fair, and consistent in representing SAM's core values. A large number of SAM members (85 in the SAMLN17 plus many others) testified or made contacts to represent SAM advocacy priorities with this objective at the forefront.
- 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 School Funding Interim Commission 2016, Rise4Montana, the Zogby poll 2016, and production of the *GREAT IV* 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 IV*.

- Focus attention on the value our public schools bring to each community as described in *GREAT IV*.
- 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 Board review of the strategic plan using the knowledge-based questions on 10/19/16](#) (see separate document) described continuing to develop the strategic plan, holding ourselves accountable, being proactive with our stance on issues, being fiscally transparent, being able to defend positions, being consistent in the communication, as actions required to accomplish this objective.
- During 3rd quarter the work with the new Superintendent of Public Instruction and the new office team has been conducted with integrity and respect, keeping fairness and honesty at the forefront. The same is true for the extensive advocacy work in the legislative session and at the federal level with changes in the presidency and administration.
- SAM and affiliates focus on advocacy during 3rd and 4th quarter encouraged fairness, honesty, and respect in representing SAM’s core values. A large number of SAM members (85 in the SAMLN17 plus many others) testified or made contacts to represent SAM advocacy priorities with this objective at the forefront.
- Continued efforts to support the Superintendent of Public Instruction work to support the field. Also, fidelity to the collaborative work of MT-PEC.

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 issues impacting education – [Montana ESSA Consolidated State Plan](#), [HB 374 Suicide Prevention Workgroup](#), Special Ed Coop Funding Task Force, Content Standards Committees, Montana Early Childhood Education, Chapter 57 flexibility in educator licensure review, AdvancED accreditation, and others.
- Cooperating with partners in the development of – [RISE4MT](#) educator recruitment and retention effort, MUS Rural Educator Recruitment and Retention Task Force, [Montana Educator Performance Appraisal System \(EPAS\)](#), [EducationSuperHighway](#) broadband access initiative, Montana K-12 Connectivity Workgroup, [Montana Farm 2 School](#) Task Force, [Montana Afterschool Alliance](#) Steering Council, Montana Multi-tiered System of Supports (MTSS) Workgroup, Montana CSPD Stakeholder Group.
- [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.
- [SAM Board review of the strategic plan using the knowledge-based questions on 10/19/16](#) (see separate document) identified the need for a recruitment strategy for in state and out of state partnerships that can offer services to our schools by creating a data base for resources, as actions required to accomplish this objective.
- SAM continues to keep our strategic plan goals in the fore front with a key focus on advocacy and relationship building with new officials happening during 3rd quarter.
- The SAM Executive Board indicated support for moving forward with offering a newly configured SAM Leaders Professional Learning Program for 2017-18. The new SAM LPLP is a professional learning delivery system that is personalized to meet the needs of administrators involved in enhancing their leadership skills and positively impacting the work they do for students.
- SAM worked to continue appointments of administrators to serve on the OPI Variance to Standards Review Board, filled with a SAM member Superintendent, Secondary Principal, and Elementary Principal representative.
- SAM members have participated and led opportunities for Professional Learning and Advocacy during 4th quarter in preparation for the coming school year.
- SAM members continue to provide input for the MT ESSA Plan, which is undergoing revisions facilitated by the [Office of Public Instruction](#). The timeline for the redeveloped draft plan to go to the

public for input is July 12, 2017 with draft to the Governor for review on August 11, 2017 and submission of the MT ESSA Plan to the USED by September 4, 2017 for peer review.

- The SAM LPLP as been restructured and a new partnership developed with the Montana University System 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 65th Legislative Session was clearly an all-hands-on-deck effort of SAM members. Federal advocacy has been a focus during the 4th quarter.

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 have 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.
- [SAM Board review of the strategic plan using the knowledge-based questions on 10/19/16 \(see separate document\)](#) described continuing to gather data to help form SAM's position priorities and continued work on effectiveness and efficiency of the SAM Legislative Network 2017, as actions required to accomplish this objective.
- [SAM has developed key processes for advocacy in the 2017 Legislative Session and with Congress during the 3rd quarter.](#) SAM is a key contributor to the work of the MT-PEC showing a consistent and powerful advocacy message for both legislators and congress.
- [SAM 2017 Legislative Session Summary](#) describes the progress of SAM during the 65th Legislative Session in 2017.
- [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 during this year and 4th quarter.

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 2016 revealing Montanan's support for their public schools. Helped create the "*Essential Truths About the Great Work of Montana's Public Schools, Volume 4 (GREAT IV)*", released at MCEL 2016 and intended to help all administrators and the education community with talking points to be used throughout the 2017 Legislative Session.
- SAM has informed the membership of advocacy work throughout the year using the weekly digital SAM Update and the SAM Bulletin.
- [SAM Board review of the strategic plan using the knowledge-based questions on 10/19/16 \(see separate document\)](#) described communication between all affiliates as actions required to accomplish this objective.

- Created the [2017 Legislative Session](#) webpage as a resource to be used by all SAM members during the legislative session.
- SAM members and Executive Director participated in the [K-12 Vision Group](#) work developing the 2017 strategic plan prior to the legislative session. 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.
- SAM collaboration with MT-PEC during the legislative session led to documents to assist SAM members with interpretations of several bills impacting education funding and taxation that passed during the legislative session. [SAM 2017 Legislative Session Summary](#) provides a review of the MT-PEC prepared information the education community to understand impacts and facts of complicated legislation.

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 Steering Committee is being implemented with fidelity as outlined in the SAM Bylaws and is beginning year 4 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 13, 2016 to consider a number of advocacy issues in preparation for the SAM Board Meeting (October 19, 2016) and the Annual SAM Business Meeting (on October 20, 2016).
- The Steering Committee is accomplishing a great deal in helping our entire membership understand and take action on SAM's advocacy priorities.
- [SAM Board review of the strategic plan using the knowledge-based questions on 10/19/16](#) (see separate document) described each affiliate ensure steering committee membership as an action required to accomplish this objective. This has been accomplished.
- [SAM Steering Committee met on 11/29/16 to review the 2017 legislative process, Governor's Biennial Budget Proposal, the SAM Legislative platform and forming the SAM Legislative Network 2017 \(SAMLN17\).](#)
- [SAM Steering Committee met on 12/14/16 to further form the SAMLN17, establish communication channels for the legislative session, and review bill drafts.](#)
- The SAM Steering Committee has convened electronically numerous times during the 2017 legislative session to help determine SAM's stance on legislation as it arises. The council of the Committee is extremely valuable in assisting the SAM lobbyist team to present SAM positions of advocacy on bills during the session.
- The SAM executive board is recommending that the SAM board consider appointing the Delegate Assembly Steering Committee Chair to preside over the Delegate Assembly.
- The [SAM Delegate Assembly Steering Committee](#) continued their work to provide oversight to advocacy efforts of SAM and to prepare for SAM Delegate Assembly 2017. The committee met on May 11, 2017 and again on June 9, 2017.
- [SAM Delegate Assembly 2017](#) is prepared to review SAM's advocacy priorities, positions and resolutions on June 15-16, 2017.

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 is initiating and preparing the SAM Legislative Network to provide effective communication during the 2017 legislative session.

- [SAM Delegate Assembly 2016 recommendations are prepared for the Annual SAM Business Meeting](#) (October 20, 2016) for action of the SAM membership to set SAM's advocacy priorities for the 2017 legislative session.
- SAM participated with [MT-PEC](#) creating [Issues Spotlights](#) on education Advocacy issues at the state and federal level.
- 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 Priorities](#) and understand relationship to MT-PEC priorities:
 - Support Recruitment and Retention of Quality Educators (Recruiting Incredible School Educators [Rise4Montana](#)). Emphasis on public school health insurance costs
 - Oppose Privatization with Public Funds
 - Support [Special Education Funding Adequacy and Equity](#)
 - Support Capital Facilities/Technology Infrastructure Needs
- SAM members' leadership and participation in the development of the [MT ESSA Consolidated State Plan](#) for implementation of the Every Student Succeeds Act (ESSA) is a high priority - 18 of the 35 [stakeholders](#) are SAM members. Committee meetings – May 25-26, September 26, October 24.
- 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.
- [School Funding Interim Commission \(SFIC\)](#) – Communicating with Commission members offering support for accomplishing their charge. Met on September 23, 2015 adopting a work plan that included the SAM and MT-PEC priorities. Meetings held on January 11-13, April 4-5, May 3-5, and June 13 continued focus on 1) Recruitment/Retention, 2) District Structure & Equity, 3) Facilities, and 4) Special Ed Funding. Final meeting on August 29 approved a [Final Report](#) which SAM and MT-PEC acknowledged but indicated that the report falls short of adequacy and equity to develop the full potential of every child through the basic system of elementary and secondary schools.
- [SAM Board review of the strategic plan using the knowledge-based questions on 10/19/16](#) (see separate document) described continuing these efforts, as actions required to accomplish this objective.
- [GREAT IV](#) was released to the membership at MCEL on 10/20/16 to provide factual information about the great work of our public schools for our members to use with their community and legislators.
- SAM office sent a [letter](#) to all 150 elected legislators to introduce them to SAM and to inform them of our intent to be a key resource for them on educational issues.
- SAM Executive Director met with Superintendent-elect Elsie Arntzen on 11/15/16 and 12/15/16 to offer assistance in her transition to the Office and to present her with the SAM Advocacy Priorities.
- SAM has developed significant web-based tools for following the [2017 Legislative Session](#). [SAM advocacy priorities, positions and resolutions approved by the membership on 10/20/16](#) are the foundation of the advocacy platform.
- [SAM Legislative Network 2017](#) (SAMLN17) is operating to provide legislators with key input and background on issues and bills under their consideration. The SAMLN17 has 85 SAM members studying the issues and moving legislation forward with Calls to Action on SAM's advocacy priorities. The [SAM Legislative Network 2017](#) webpage has significant resources with Updates and Weekly Schedules of committee hearings during the session. Weekly updates to all SAM members have been provided in the SAM Update.
- The [SAM Bills 2017](#) webpage is established to track bills by SAM Advocacy Priorities – School Funding, Special Ed Funding, Facility and Technology Infrastructure, Recruitment and Retention of Quality Educators, and Opposition to Privatization with Public Funds.
- [SAM Legislative Reports 2017](#) webpage has reports of progress on SAM advocacy priorities during the session. As of March 31, SAM has tracked 146 bills impacting education, and the SAM advocacy team has provided testimony in support or opposition 80 times on bills requiring our advocacy.
- [SAM 2017 Legislative Session](#) web page provides information about the legislative session. The [SAM 2017 Legislative Session Summary](#) describes the overview of progress accomplished during the session. [SAM's Legislative Network 2017](#) web page provides extensive details of the work of the 85

SAM members who served on the SAMLN17 and progress throughout the session. [SAM Bills 2017](#) describes the progress of all bills followed by SAM during the session including the [SAM Bills Status by Priority Final Report](#).

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, E-Rate and Broadband access for schools, and the REST Act and NEST Act rural educator recruitment legislation.
- 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 participated in FCC Chairman Wheeler’s visit to Montana schools in October 2015.
- 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.
- [SAM Board review of the strategic plan using the knowledge-based questions on 10/19/16](#) (see separate document) described communicating with staff and colleagues a call to action, as an action required to accomplish this objective.
- SAM members Laurie Barron, Tammy Lacey, Kaide Dodson and Executive Director Kirk Miller participated in “A View from Montana” roundtable on implementing ESSA with Senator Tester, Superintendent Juneau and Special Guest Ruthanne Buck (Senior Advisor to the US Secretary of Education) on 10/18/16. Key discussion on the USED implementation of Montana’s ESSA Consolidated Plan.
- SAM members (20 of the 36 participants) participated in [the Montana ESSA Stakeholder Group](#) to develop [Montana’s ESSA Consolidated Plan](#). The [final plan](#) was submitted on to the USED on 12/28/16 by Superintendent Denise Juneau and Governor Steve Bullock with the input of Montana through the stakeholders group and the public.
- [SAM Federal advocacy](#) is established by our affiliate federal relations coordinators working together to develop [SAM Federal Advocacy Priorities 2017](#).
- Affiliate federal relations teams are meeting with Montana’s congressional delegation and attending the Federal Advocacy Conferences in order to insure Montana federal advocacy priorities are shared nation-wide. Having the SAM federal advocacy priorities established is instrumental in providing a consistent message about SAM’s stance on federal issues.
- [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 during this year and 4th quarter.

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.
- SAM worked closely with the K-12 Vision Group and MT- PEC to establish areas of focus for the 2017 legislative session and education advocacy issues as outlined in Strategic Objective 2.3.
- SAM has helped establish [MCEL 2016](#) – Expect the release of the *GREAT IV* 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 organizing and preparing the SAM Legislative Network for implementing SAM's advocacy priorities during the 2017 Legislative Session beginning in January 2017.
- 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.
- [SAM Board review of the strategic plan using the knowledge-based questions on 10/19/16 \(see separate document\)](#) described continued collaboration with the education stakeholders as actions required to accomplish this objective.
- [Created the 2017 Legislative Session](#) webpage as a resource to be used by all SAM members during the legislative session.
- [Continued effort to have MT-PEC meet on a regular schedule during the legislative session to advocate effectively for education priorities.](#)
- [The effectiveness on the SAM Delegate Assembly process establishing Positions, Resolutions and Advocacy Priorities is clearly evident during the legislative session and is demonstrated on SAM's ability to deliver consistent positions with our partners and legislators.](#)
- [Web-based tools are provided to the SAMLN17 to assist in advocacy, everything from navigating the Session webpage, to a video on how to provide testimony, to following bills in SAM's advocacy priorities.](#)
- [SAM was integral in creating the professional development and training during the Caucus Day on the Hill \(2/13/17\) and Day of Advocacy \(3/13/17\).](#) Over 100 SAM member were present at one or both of these events.
- [Success in the 2017 legislative session for protecting public school funding, budget authority and defeating of attempts to privatize with public funds are described in the SAM 2017 Legislative Session Summary.](#) Significant effort and organization of SAM members created that success.

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.
- The SAM office team is recommending a change to Association Management Software (AMS) and website operations in order to improve member experiences and delivery operations. Tentative timeline for implementation is November 2016 to begin making conversions.
- [SAM Board review of the strategic plan using the knowledge-based questions on 10/19/16 \(see separate document\)](#) described continued discussion and collaboration along with calls to action, as actions required to accomplish this objective.
- [Created the 2017 Legislative Session](#) webpage as a resource to be used by all SAM members during the legislative session and have fully developed the SAM Legislative Network 2017 ([SAMLN17](#)) for effective communication during the session.
- [SAM's office team has developed the 2017 Legislative Session](#) webpage to assist in this advocacy goal.

- SAM's office team has completed significant research into effective communication tools for our organization and will be launching [MemberClicks](#) association management software on April 3, 2017. The new communication tools will enhance our ability to deliver services that meet the needs of our members in a professional, effective and innovative way.
- 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. Anticipated for launch in the fall 2017 will be the discontinuation of SAM's list serves 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 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 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 -- #samai16 -- during the SAM Administrators Institute 2016 in July to promote communication during the conference.
- [#SAMedchat](#) is developed, underway, and takes place every Thursday 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.
- SAM Board review of the strategic plan using the knowledge-based questions on 10/19/16 (see separate document) described instruction on using social media (specifically twitter), advertising of SAMedchat topics, making a conference attendee responsible for tweeting using the conference hashtag, identifying a responsible member to host a live chat during conferences, and sharing with SAM members those who use twitter effectively, as actions required to accomplish this objective.
- Progress has been made on each of the above actions.
- [#SAMedchat](#) is being utilized by educators to share best practices and to dialogue about successful implementation of programs for student learning.

- [#SAMedchat](#) has been successful in 2016-17 with 10 sessions occurring throughout the year. The participation of Montana educators and others has varied largely based on the topic. Plans are being made to continue and expand this professional learning opportunity for 2017-18.
- Affiliate conferences have successfully utilized twitter feeds during the conference to share back channel discussions on conference topics, thus enhancing the conference experience.

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 2015-16. The SAM Administrators Institute 2016 Instructional Leadership Summit held 3 sessions of Ed Camp facilitated by Robert DoBell, Paul Furthmyre, and Jon Konen. 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.
- [SAM Board review of the strategic plan using the knowledge-based questions on 10/19/16](#) (see separate document) identified more information on what ED Camp is and making Ed Camps a priority at SAM/Affiliate meetings, as actions required to accomplish this objective.
- [Progress has been made on each of the above actions.](#)
- [Affiliate Conferences have all utilized ED Camp strategies to increase communication on important topics and issues for education in Montana.](#)
- [Using ED Camp strategies are becoming the norm during conferences and governance meetings to allow the participants to drive the discussion and learn from one another. Planning to continue use of ED Camp strategies in 2017-18.](#)

3.1.3 Technology Professional Development – work with SAM members on social media and technology

- [SAM Administrators Institute 2016](#) incorporated a ‘Leadership and Technology’ Focus Zone with META affiliate members and Social Media experts presenting on a number of educational technology topics.
- 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.
- [SAM Board review of the strategic plan using the knowledge-based questions on 10/19/16](#) (see separate document) described instruction on using social media (specifically twitter), advertising of SAMedchat topics, making a conference attendee responsible for tweeting using the conference hashtag, identifying a responsible member to host a live chat during conferences, and sharing with SAM members those who use twitter effectively, as actions required to accomplish this objective.
- [Progress has been made on each of the above actions.](#)
- [The launch of the new MemberClicks association management software on April 3, 2017 will increase access of our SAM members to social media sources. Twitter, Facebook, Instagram and other social media tools will all be directly connected to the new SAM website.](#)
- [The new SAM website will allow the formation of Communities \(blogs\) for topical discussion boards on any affiliate priority or state-wide education priority. The website will allow easy member login access to the Communities any individual SAM members wishes to access.](#)
- [SAM’s new association management software \(MemberClicks\) allows establishment of ‘Communities’ \(Committee and Groups – technically\) for affiliate and topical discussions. Use of the ‘Communities’ is planned for fall 2017 to enhance the ability of our members to communicate on topics of importance to their work.](#)
- [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 2015-16 ended the year with successful participation of 54 Montana administrators. [SAM LPLP 2015-16 Executive Summary](#) describes the great progress made.
- [SAM LPLP 2016-17](#) is underway. Information about, and registration for, the SAM Mentor Program and the SAM 21 CLI are available and advertised to the SAM membership. Videos describing each program are a tool on the website.
- [SAM Board review of the strategic plan using the knowledge-based questions on 10/19/16 \(see separate document\)](#) described working closely with district leadership to promote programs and providing data to show that the program helps our members stay in current positions, as actions required to accomplish this objective.
- [Progress has been made on each of the above actions.](#)
- The [SAM LPLP 2016-17](#) is meeting the needs of administrators in the field who are new to their position. The [SAM LPLP 2016-17 Mid-Year Executive Summary](#) reveals the progress the program is making with mentees.
- 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.
- [SAM LPLP 2017-18](#) is ready, with new strategies to encourage Montana administrators to join this personalized professional learning. The SAM LPLP 2016-17 Executive Summary is being prepared to keep the data on year 4 of the program.
- 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.

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 54 participants in the SAM LPLP 2015-16. This data 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. Review at [SAM LPLP 2015-16 Executive Summary](#). The 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.
- [19 new leaders attended](#) the SAM Administrators Institute 2016 New Leaders Summit and were joined by 9 role alike facilitators and 7 LPLP Providers and Program Directors. All have been invited to attend MCEL 2016 Clinic Session II for a review of the first 100 days, facilitated by Godfrey Saunders, SAM LPLP Mentor Program Director.
- SAM LPLP 2016-17 now has 32 participants ([24 Mentees, 8 21 CLI Members](#)).
- SAM LPLP Data Collection tool indicates 180 entries through 1st Quarter in communication with the 32 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 has increased outreach to the Montana University System and OCHE to analyze PK – 12 Partnerships that would utilize the SAM Leaders Professional Learning Program for the communication link to Montana administrators. Adding administrators in Montana Education Talent Search schools to participate in the program for 2016-17 and enhancing the partnership

with Montana GEAR UP administrators. More ideas continue to be developed for these partnerships.

- Working to establish SAM LPLP 2.0 in hopes of making the SAM LPLP available to all SAM members connecting them with the resources they need to assist their professional learning and provide resource access to improve their work through the year.
- Working to develop funding streams to make the SAM LPLP self-sustaining.
- [SAM Board review of the strategic plan using the knowledge-based questions on 10/19/16](#) (see separate document) described reaching out to district superintendents to garner support for other leaders' active membership and involvement in SAM and affiliates, as actions required to accomplish this objective.
- [Progress has been made on each of the above actions.](#)
- [The SAM LPLP 2016-17 Mid-Year Executive Summary](#) reveals the progress the program is making with mentees and 21 CLI members. Plans are made to implement the SAM LPLP 2017-18 with the launch beginning on April 3, 2017.
- The research on 4 years of implementing the SAM LPLP led to changes to be offered to SAM LPLP 2017-18 participants. SAM LPLP Providers will serve those participants who request, the SAM LPLP Resource Center (based upon the Professional Standards for Educational Leaders) will be fully functional for use by participants, and delivery system strategies will be in place to allow cohorts of administrators working on topics to enhance their school (professional learning teams) to communicate effectively with each other.
- 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.
- Communications (letters) to Board Chairs and Superintendents to encourage participation of administrators new to the district. This targets administrators new to their position to be involved in the SAM LPLP.

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

- The SAM Needs Assessment Survey 2017 will be created digitally for distribution in December with data collected and reviewed in January.
- [SAM Board review of the strategic plan using the knowledge-based questions on 10/19/16](#) (see separate document) described sharing results with appropriate audiences and consideration of making mentor assignments an automatic benefit for the 1st 2 years of SAM membership, as actions required to accomplish this objective.
- [The SAM Needs Assessment Survey 2017](#) was revised (with input from the SAM Board see [changes made from 2016 to 2017 SAM Needs Assessment Survey](#)) and administered in December, closing on January 9, 2017. [SAM Needs Assessment 2017 Executive Summary](#) (reviewed at the SAM Board Meeting 1/13/17) describes the findings and conclusions based on the survey results.
- [The SAM Needs Assessment Survey Executive Summary 2017](#) describes the findings and conclusions. This discussion at the SAM Board meeting on 1/13/17 has established topical areas for conferences for 2017-18 and increased member services to be launched through the MemberClicks association management software.
- 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

- [SAM Membership Report 1st Quarter 2016-17](#) shows continued stability in the membership numbers at 960 as of September 30, 2016. This is 94 more than 1st Quarter 2015-16, and just 27 short of the record breaking membership (987) at the end of 2015-16.

- 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.
- [SAM Board review of the strategic plan using the knowledge-based questions on 10/19/16](#) (see separate document) described offering a discount if full District eligible staff join SAM and affiliate at the same time (particularly targeting AA and A districts), as actions required to accomplish this objective.
- [SAM Membership Report 2nd Quarter 2016-17](#) shows the 1000 member goal has been reached and exceeded because of our focus in this area!
- [SAM Membership Report 3rd Quarter 2016-17](#) shows 1018 members, an all-time record for SAM and affiliate membership! Each affiliate has shown increases in their membership over the previous year.
- The 2017-18 membership drive will be 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 4th Quarter 2016-17](#) shows a record 1019 members with each affiliate increasing their membership numbers.
- The membership drive for 2017-18 began on April 3, 2017 using the power of the new MemberClicks association management software. The [SAM Membership Information](#) webpage describes this work in detail. We have received 362 paid membership renewals for 2017-18 as of June 5, 2017!

3.3.2 Maintain current services while implementing new social media services

- [SAM Administrators Institute 2016](#) provided great learning opportunities for over 170 members (attending at least 1 day of the SAM AI 16) – theme was “Leadership of Transformational Change for the Whole Child.” SAM Administrators Institute 2016 included Summits for MTASCD, New Leaders, Instructional Leadership, and 21st Century Leadership Institute. Each Summit was highly successful for 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 2016-17](#) by reviewing training for program Providers, marketing the program to members, launching the 2016-17 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 2016](#) (successfully held a first joint conference), and [MACSS Fall Conference 2016](#) were successful with good numbers of attendees and favorable feedback on evaluations.
- [MCEL 2016](#) – Expect the release of the *GREAT IV* 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 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 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.

- SAM is using the [Conference web pages](#) to keep our members informed about all of the resources and materials developed at each conference throughout the year. A simple click on the Conference web page gives the reader access – [MASS/MCASE Fall Conference 2016](#) is an example.
- Each conference in 2016-17 will develop a twitter presence with ongoing dialogue being displayed at the conference registration table.
- [#SAMedchat](#) is developed, underway, and takes place every Thursday 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 [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 Board review of the strategic plan using the knowledge-based questions on 10/19/16 (see separate document) suggested pushing info via social media outlets and lead by example creating a new norm, as actions required to accomplish this objective.
- Progress has been made on each of the above actions.
- The SAM Board provided [Input into Items that are Benefits \(Value\) of SAM Membership to be used for promoting current services and implementing new services.](#)
- [#SAMedchat](#) is being utilized by educators to share best practices and to dialogue about successful implementation of programs for student learning.
- 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.
- Plans for the SAM Administrators Institute 2017 and MCEL 2017 are underway based on the findings of the SAM Needs Assessment Survey. The conference topics and agendas are targeted to meeting the professional learning needs of our members.
- SAM 4th quarter results showed increased use of website and social media resources by our members. 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.

Thanks SAM board members and all affiliate members for your leadership to accomplish the goals of the SAM Strategic Plan 2014-18 during 2016-17. 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