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

- This section of the report is intended to summarize what your staff (Patrick, Gary, Vicki, 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 in 1.1.
   - SAM members and office team continue to represent the interests of administrators on committees and task force related to education. Examples are the professional and ethical actions of administrators who served on the committees revising Chapters 57, 58 and 63 of the administrative rules of Montana. The Board of Public Education adopted the recommended changes as suggested by the SAM participants.
   - The 64th legislative session has provided numerous opportunities for SAM members to demonstrate integrity and the promotion of educational interests supporting the organizations’ values. Click HERE to review the SAM Legislative Session Testimony Log 2015.
   - SAM members and our advocacy team represented the SAM priorities established through our Delegate Assembly process very well during the 64th legislative session. Many instances of testimony and one-on-one discussion took place with legislators and education partners across a wide spectrum of issues – all represented with integrity, honesty and fairness.

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.

- Using the example above our SAM members support of the process for revising Chapters 57, 58, and 63, the desired results were obtained keeping intact fairness, honesty, respect and courtesy for the process and those who participated.
In our Advocacy work, SAM members have dedicated themselves to fairness, respect and
courtesy in working with legislators, partners, agencies, other lobbyists, and their school
community.

SAM’s work in Professional Development and Advocacy has produced positive results
without subverting fairness, honesty, respect or courtesy for all involved.

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

- Leadership of Affiliates are deeply involved in the current review of Chapters 57, 58 and 63.
The goals of SAM, as well as the SAM Positions and Resolutions, are a part of what they have
brought to the table for discussion.
- SAM members participated to the completion of the review of Chapters 57, 58 and 63,
presenting testimony at the hearings and in front of the Board of Public Education.
- Given the Advocacy focus during 3rd quarter, a review of the SAM Legislative Network 2015
actions and updates will reveal the use of the talents and energy of the membership in
promoting the goals of the association.
- SAM member have applied their talents and energy in the Professional Development and
Advocacy goal areas to assist their fellow administrators with networking and learning, and to
make a positive difference for the education of children during a legislative year.

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.
- Continued significant effort has been made to prepare for the 2015 legislative session;
including the formation of the SAM Legislative Network for communication with members
during the session, continued work with MT-PEC to seek alignment of the most important
education issues.
- SAM Delegate Assembly Steering Committee members have created SAM Federal Issue
Positions and statements for support for the use of all affiliates when working with Montana’s
Congressional Delegation on federal issues impacting education.
- SAM has continued to be a contributing member of MT-PEC, and assisted in the writing of six
Issue Spotlights to focus attention on advocacy at the state and national level. Click HERE to
review the Issue Spotlights.
- SAM coordinated the effort of developing a Montana Issue Spotlight through the MT-PEC on
the reauthorization of ESEA currently being contemplated by Congress. Click HERE to
review this Issue Spotlight.
- SAM was successfully committed to communicate effectively with MT-PEC, legislators and
all involved to advocate for SAM’s Legislative Priorities during the 2015 legislative session.
Click HERE to review the SAM 2015 Legislative Session Summary.
- SAM leadership from all affiliates actively communicate with Montana’s Congressional
delegation about education issue priorities for our State. Click HERE to review SAM’s
statements of support for federal issues.
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.

- SAM continues to be a leader in the work of MT-PEC.
- Assisted in the Zogy Poll revealing Montanan’s support for their public schools. Helped created the “Essential Truths About the Great Work of Montana’s Public Schools, Volume 2”, released at MCEL 2014 and intended to help all administrators and the education community with talking points to be used throughout the 2015 Legislative Session.
- Distributed the “Great Works II” document to all SAM members with message about the value of membership in November.
- Worked with MT-PEC to create an Issue Spotlight on the Governor’s Budget Proposal to clarify the stance of the education community on the proposed budget.
- Working on MT-PEC Issue Spotlight on Facts About Privatization in January to provide SAM members with talking points on this key issue in the legislature.
- SAM has continued to be a contributing member of MT-PEC, and assisted in the writing of six Issue Spotlights to focus attention on advocacy at the state and national level. Click HERE to review the Issue Spotlights.
- SAM coordinated the effort of developing a Montana Issue Spotlight through the MT-PEC on the reauthorization of ESEA currently being contemplated by Congress. Click HERE to review this Issue Spotlight.
- SAM worked with MT-PEC partners to produce eight Issue Spotlights this year addressing a number of advocacy issues important to our schools. Click HERE to review all 8 Issue Spotlights.

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

- Fully operational in 2013-14 and ready to be continued in 2014-15.
- Steering Committee has continued to meet in the 2nd Quarter and assisted in the formation of the SAM Legislative Network with representation of SAM members from each affiliate region.
- The Steering Committee has been convened during the 64th Legislative Session to develop SAM positions on bills that were not clearly outlined in the SAM Positions and Resolutions. Specifically the Committee helped develop an Action designation (which allowed SAM to seek a legislator and help get the bills into the legislative process) for HB 295 (Pease-Lopez) to Revise law for signage warning drivers of a school bus stop ahead and HB 387 (McConnell) to Revise county transportation committee laws.
- The Steering Committee met on May 8 to write a proposed resolution on statewide testing by request of the SAM Board of Directors.
- The Steering Committee met on June 4 to review and make recommendations on new proposed Resolutions, current Positions, and current Resolutions for the SAM Delegate Assembly consideration on June 12. This committee is a group of knowledgeable, highly engaged leaders who have done excellent work to assure that SAM’s advocacy for education issues is outstanding.
2.3 SAM will provide quality resources that contain current educational facts and implications to all stakeholders.

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 and used by each affiliate meeting with the Montana Congressional Delegation.
- SAM Federal Issue Positions and statements for support have been updated for 2015 for the use of all affiliates when working with Montana’s Congressional Delegation on federal issues impacting education.
- SAM coordinated the effort of developing a Montana Issue Spotlight through the MT-PEC on the reauthorization of ESEA currently being contemplated by Congress. Click HERE to review this Issue Spotlight. Positions on federal issues for SAM and affiliates are now posted on the SAM web page under the ‘Legislature’ tab, then ‘Federal Issues’. This page is kept current with federal issues and Congress.
- SAM has coordinated with affiliate representatives who are engaging with Montana’s Congressional Delegation using the Federal Issues Positions as a starting point for communicating. Issues this year have involved FCC changes to the E-Rate, work on reauthorization of ESEA, and also IDEA. This advocacy is an ongoing process.

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

- Currently working to train new staff in the use of the Montana legislature web site in preparation for the 2015 Legislative Session.
- SAM website Legislature tab has been updated with information to assist all SAM members in following the 2015 Legislative session. The website has all resources in one place, ability to review Bills followed by SAM, and efficient ways to communicate.
- SAM Legislative Network has been formed (and is on the SAM website) to allow comprehensive communication of SAM issues during the legislature so that the voice of administrators will be heard at during the session.
- Implementation of the SAM Legislative Network and structure for communication has been effective during 3rd Quarter. Click SAM Legislative Network 2015 on the SAM web page to review the updates and progress of the SAM legislative advocacy efforts. Click Bills Followed by SAM to get the latest update.
- 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.

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

- The research on the needs for strengthening the SAM office was completed. The SAM Board approved a new structure for the SAM office on July 2, 2014. The new structure created is intended to strengthen the ability of the SAM office to advocate, provide professional development, and enhance member services. The structure created an Associate Director position for Advocacy and Member Services, an Operations Manager position, and a half time Receptionist position. Job descriptions were created, positions announced and hiring process put into place to seek highly qualified individuals for these positions.
• Each of these positions were filled in August and September 2014 with highly qualified professionals. Pat Audet (Associate Director), Gary Wagner (Operations Manager), and Vicki Norling (Receptionist) have joined the SAM team. Each is currently undergoing extensive professional development and training in the duties and responsibilities of their new positions.

• Development of the new SAM office team is making great progress. The redefining of roles and responsibilities, orientation and training was effective during 2nd Quarter. The restructure will serve the SAM membership effectively into the future.

• During 2nd Quarter our office team decided to upgrade our financial capabilities by reviewing accounts of all affiliates in depth to develop better reporting for the affiliate boards. In the process of doing this, the office developed a new relationship with an accountant better prepared to assist our new strategic plan. Progress is being made in this area.

• The new SAM office team has been together for nearly 6 months operationalizing advocacy for the legislative session, preparing for 4 conferences, developing launch materials for 2015-16 membership drive and professional learning opportunities. The team is coming together very well in serving the SAM membership under the three goals of the strategic plan.

• Progress with a new accountant, MRG Financial Services (Marca Gibson) has stabilized our accounting procedures, allow for the calculation of the net assets of SAM and affiliates, and we are preparing to request proposals for an audit of the financial statements.

• The new SAM office team allowed SAM to advocate very effectively during the 2015 legislative session. Associate Director, Pat Audet and Executive Director, Kirk Miller were able to provide testimony and effectively work with legislators and education partners throughout the session as a result of the new office structure.

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
• Created a twitter presence throughout the SAM Administrators Institute 2014.
• Preparations in the works to participate on a regular basis in the MT Ed Chat.
• Developed the SAM Ed Chat and preparing to launch a weekly chat and advertise this so our members will use this mode of communication.
• Communicated the development of SAM Twitter presence and Facebook presence through the SAM Updates during 2nd 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.
• Plans are in place for using the hashtag -- #samai15 -- during the SAM Administrators Institute 2015 in July to promote communication during the conference.
3.1.2 ED Camp – professional development provided to workshop attendees; defining SAM’s role.
- Preparing a Technology Focus Zone for the SAM Administrators Institute 2015 Instructional Leadership Summit (July 29) that will begin to define SAM’s role in ED Camp professional development.
- 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.

3.1.3 Technology Professional Development – work with SAM members on social media and technology
- MASS Spring Conference developed a clinic session on technology professional development. META leaders are providing this session.
- META is planning their first Conference for March 16-17, 2015 in Helena.
- Preparing a Technology Focus Zone for the SAM Administrators Institute 2015 Instructional Leadership Summit (July 29) with breakout sessions on technology. Review the SAM Administrators Institute 2015 description an update on plans for this summer.
- Continued discussion between affiliates with META to provide technology related training at affiliate conferences.
- SAM Administrators Institute 2015 will incorporate a Technology Focus Zone with META affiliate members presenting on a great number of topics. The Institute plans include an “Internet Café” concept where an area of the conference will be set up to include short sessions on using social media effectively for education. The short sessions will be led by Montana technology education experts engaging in attendees in examples and hands on use of social media technology tools.

3.2 Mentorship
3.2.1 Extend the SAM mentor program
- The details of making available regionalized Providers to assist both mentees (proteges) in the Mentor program and members of the 21 CLI was established and independent contractor agreements were put in place with 8 providers and 2 program directors.
- Advertising and advocacy for the program was prepared and implemented throughout the first quarter of 2014-15.
- The result is 73 Montana administrators participating in the LPLP 2014-15.
- SAM LPLP 1st Quarter Report was developed and shared on the SAM website. The report is comprehensive in describing the Mentor Program progress as well as the 21 CLI progress. The SAM LPLP 2nd Quarter Report is being updated to provide progress accomplished during the 2nd Quarter.
- SAM LPLP 3rd Quarter Report was developed and shared on the SAM website. The report describes the progress being made with the LPLP in 2014-15.
- SAM Executive Board endorsed continuing the SAM LPLP 2015-16 including the Mentor Program and 21st Century Leadership Institute. Materials to describe the LPLP 2015-16 are prepared and being shared with SAM members in a variety of modes.
SAM LPLP is being promoted as a key element of SAM’s professional learning opportunities for administrators across the state. Final data collection from the 72 members in the SAM LPLP 2014-15 will allow the creation of the Final Report at the end of June. Over 1000 points of data have been collected in 2014-15 with Mentees and 21 CLI Members collectively engaging in over 6000 hours of professional learning targeted on improving student learning in their schools. A great effort that collectively enhances administrator contributions to improving student learning statewide.

SAM LPLP 2015-16 is being promoted as an effective way to engage in professional learning using all avenues of advertising. Registrations are currently low but we expect to have this increase prior to the kick of the program at the SAM Administrators Institute in July.

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 2014-15. Providers are collecting data regularly in their work with their proteges and 21 CLI members.
- SAM LPLP 1st Quarter Report 2014-15 has been prepared, shared with key education supporters (OPI request) and in posted on the SAM website – click HERE.
- SAM LPLP 2nd Quarter Report 2014-15 is being updated to provide progress accomplished during 2nd Quarter.
- SAM LPLP 3rd Quarter Report 2014-15 includes data on program participation. Specifically over 800 data entries have been made by LPLP Providers and we have extensive information on the program. More than 5650 hours of professional learning opportunities have been logged by the 72 administrators in the SAM LPLP.
- An extensive report was prepared for GEAR UP and the nine administrators in the 21 CLI who serve in GEAR UP schools. GEAR UP is a business partner in the SAM LPLP.
- SAM 21 CLI participants are finishing the Showcase of projects. All webinars and meetings have been recorded for the use of the LPLP members.
- SAM Mentor Program final reports are included in the data collection.
- SAM LPLP Providers have collected data on Mentees to determine the effectiveness of the program. That information will be included in late June in the SAM LPLP 2014-15 Final Report.
- Letters have been sent and phone calls have been made to encourage administrators new to their position in 2015-16 to join SAM’s LPLP Mentor program.

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

- SAM Needs Assessment Survey 2015 was created digitally (Survey Monkey) and distributed in December with responses Due January 9, 2015. An executive summary of survey results will be developed and shared with the SAM Board.
- SAM Needs Assessment Survey 2015 Executive Summary was prepared from the data collected and compiled. The SAM Board reviewed the compilation of data and executive summary at their meeting on January 16, 2015, to inform future strategies for the data.
- Needs Assessment Survey information has been used to prepare professional learning opportunities at conferences and with the SAM LPLP.
3.3 Membership

3.3.1 Maintain stability with membership while administrative positions are cut

- SAM Membership Report 1st Quarter 2014-15 shows continued stability in the membership numbers.
- New Associate Director is currently doing follow up with individual potential members, school districts who have potential members, and with the leadership of each affiliate (to request their assistance in contacting potential members).
- SAM Membership Report 2nd Quarter 2014-15 shows membership numbers consistent with and a bit ahead of the previous year. Extensive actions to communicate with administrators who are not members has been made by affiliates and the SAM Associate Director.
- SAM Membership Report 3rd Quarter 2014-15 shows membership at 977 (up from 970 at this time last year). All affiliates have shown increased membership except MAEMSP which is currently down 11 members from the final count last year.
- Membership Drive 2015-16 started on April 7 with a mailing of Membership Application/Invoice forms to district clerks. An email was sent to all current members requesting their follow up with the clerk in their district to insure that the membership is submitted for next year. The email also requested their attention to inviting administrators in their region who are not members to become members. The SAM website has all affiliate member benefit descriptions and Application forms active, and the information has been shared via the SAM Update with the all SAM list servers.
- SAM Membership Final Report 4th Quarter 2014-15 shows membership at 977 (up from 974 at the end of 2013-14). All affiliates showed slight increases in membership except MAEMSP who recorded 11 less members than a year ago.
- The SAM Membership 2015-16 is well underway with 376 members signed up as of 6-5-15.

3.3.2 Maintain current services while implementing new social media services

- SAM Administrators Institute 2014 was highly successful – largest attendance by Montana administrators in many years and very favorable feedback on evaluations of the conference.
- In September the META Board retreat, MASS Fall Conference and MCASE Fall conference were successful, with good numbers of attendees and favorable feedback on evaluations.
- 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.
- Website continues to be developed as a resource for SAM members. Progress is being made in using the SAM presence on Twitter and Facebook.
- MAEMSP has developed a Facebook page and are monitoring use while providing good information for members through the page.
- The SAM office team continues to update and revise the SAM web page to make it user friendly and a go to place to get information about services, professional development and advocacy!
- Reports on SAM projects are consistently being prepared for the website. Meetings of all affiliates and SAM have materials prepared and made available on the SAM website.
so they are accessible anywhere, anytime. Web based materials allow for effective access by meeting attendees using remote sites to attend the meeting.

- The use of technologies to allow a variety of opportunities to attend SAM functions and meetings are increasing participation in activities by members and the leadership of our affiliates.
- Use of social media in the plans for professional learning at conferences 2015-16 and the SAM LPLP 2015-16 is in the works for next year.

My thanks to the SAM Office Team for their great contributions to the accomplishments on SAM Strategic Plan this year! Thank you to the SAM affiliate leaders and our members for focusing on the goals of the Strategic Plan leading to an outstanding year of progress in member services, professional learning and advocacy!

Respectfully submitted,

Kirk J. Miller
Executive Director