

**2016 Compilation**  
**National SAM Innovation Project (NSIP)**  
**Executive Director Performance Review**

Please complete the evaluation and return to the Board President. The president will compile the results and share with the executive director. The Board and executive director will meet to discuss.

Each section begins with a brief description of an area of responsibility. After reading it the answers to the questions will measure your level of satisfaction with how the executive director is performing. Check off the number representing the degree to which you are satisfied or not satisfied:

- 1-Very Dissatisfied
- 2-Dissatisfied
- 3-Satisfied
- 4-Very Satisfied
- 5-Not sure or N/A

At the end of the sections there is a place for comments. All comments will be shared with the executive director.

**1. Vision and Mission**

The executive director’s role has both strategic and operational components. Working with the board, the executive director develops a shared vision for NSIP, builds understanding around the current mission, and develops appropriate goals and strategies to advance the mission.

How satisfied are you that:		Not satisfied		Satisfied		Not Sure	Comments
		1	2	3	4		
1-1	The executive director and staff have worked with the board to develop a clear vision for NSIP.						3.7
1-2	The executive director and staff have worked with the board to develop a clear mission.						3.85
1-3	The executive director and staff have moved NSIP forward, or closer to its vision/mission, during the last twelve months.						3.85

**Comments:**

The executive director has been instrumental in continually moving NSIP into the future. He provides vision and momentum for carrying the national work forward. While our mission is clear, there is still work to be done on our long-term vision for the corporation. Mark is aware of the situation and we are making progress, but slowly.

**2. Improving Quality**

Quality of NSIP implementation and support

How satisfied are you that:		Not satisfied		Satisfied		Not Sure	Comments
		1	2	3	4		
2-1	The executive director and staff have improved SAM implementation.						4
2-2	The executive director and staff have improved SAM coaching, training and support.						3.5
2-3	The executive director and staff have improved professional development offerings and the national conference.						3.85
2-4	The executive director and staff have improved TimeTrack™.						4

**Comments:**

- I worry that Mark is the only one who can do some of the initial training sessions.
- Mark has stated in Board meetings that there are plenty of data collectors, yet from my coaching I know that Scott sometimes has difficulty scheduling data collection in a timely manner (i.e., in a time frame that’s roughly a year from a school’s previous data collection). This is a particular concern at the start of the school year when many new teams are starting up & awaiting baseline data collection and when many existing teams are due for their annual collection.
- Between Mark’s availability and delays in baseline data collection scheduling, some of my schools’ last “annual” was done several months behind what would have been ideal for data analysis purposes. In some cases Mark has done his intro session in August, but it was November before the data collection and implementation specialist work was done and coaching begun.

While I personally have a love/hate relationship with some of the role play aspects of TCC training, I also feel that our coach training and support is the best I’ve ever seen. The annual conference TCC pre-conference session shows strong commitment to the coaches and their work.

TimeTrack continues to improve, and now the regular calendar functions are only a small part of the value of the tool. School teams notice, and particularly appreciate, the fact that many of the features and updates are the result of requests from the field.

Regular trainings are great and the notices on missed coaching and follow up are helpful, addition of PD for large districts and affiliates is a plus. Mini-conferences look better than many major conferences and TimeTrack is a wonderful example of continuous improvement and is helpful and useful for principals and SAMs.

More professional development for coaches is needed to ensure integrity of the coaching process. We need more opportunity for coaches to get together. Online is limited this year and the national conference is the only time coaches have gotten together to learn and share with each other.

The ED continues to provide high quality training and support to those implementing SAMs. In particular, he has worked hard to ensure that the technological capacity is reflective of and responsive to 21<sup>st</sup> century needs. He also ensures, as it should, that fidelity of implementation remain one of the most essential components.

Coaching training and support is insightful and very useful for the coaches.  
PD at the conference gets better every year and far surpasses other conferences of its caliber.  
TimeTrack is beyond anything that we could have imagined with the upgrades and improvements being outstanding and meeting the needs of SAM teams..

**3. NSIP Growth**

How satisfied are you that:		Not satisfied		Satisfied		Not Sure	Comments
		1	2	3	4		
3-1	The executive director and staff have increased the number of participating SAM schools over the last twelve months.						3.85
3-2	The executive director and staff have provided more support for state affiliates.						4, 1NS
3-3	The executive director and staff are building strong relationships with clients.						3.7
3-4	The executive director and staff are increasing the visibility of and interest in the SAM process.						4

**Comments:**

Mark’s support is very important and he does anything I have asked. All of his presentations around the country and abroad is helping to make SAMs more visible.

The ED continues to build SAMs across the nation and with that, increases the number and quality of relationships of educators committed to the program’s objectives. In particular, the ED is very supportive of state efforts to expand the number and quality of SAMs experiences. He achieves an effective balance between supporting state efforts and providing national resources for implementation of the program.

He is supportive of affiliates and this is appreciated. I continue to be concerned about sustainability over the years with districts. We continue to grow, but don’t really know what to do to ensure districts stay with the process after “soft money” disappears in larger districts.

Marketing is going well, brochures effective and acceptance of presentation at National GEAR UP conference in Washington DC this summer will add visibility.

I continue to be concerned that our growth seems to be predominantly large district & urban, while small, rural and poor districts have difficulty getting involved because of their severely limited resources. The sessions that Mark has held regarding using Title funds for SAM, but hope more can be done. Mark continues to be supportive even though if there is no growth in the state.

**4. Fiscal Management**

Ensuring that income is managed wisely is important. It is the role of the executive director to see that solid planning and budgeting systems are in place and that NSIP’s goals and strategic plan serve as the basis for sound financial planning. In addition, it is the executive director’s responsibility to ensure that qualified staff is hired, accurately monitor, assess, and manage the financial health of NSIP.

How satisfied are you that:		Not satisfied		Satisfied		Not Sure	Comments
		1	2	3	4		
4-1	The executive director is knowledgeable regarding financial planning, budgeting and management of fiscal resources?						3.85
4-2	The executive director has increased the NSIP fund balance over the last twelve months						3.85
4-3	The executive director presents financial reports to the Board and other information as requested?						3.85

**Comments:**

Mark is constantly aware of NSIP’s financial position and works tirelessly to ensure its financial stability.

A concern: Mark takes it as a point of pride that NSIP often can do things at less cost than can individual states or districts. One of the reasons for this, however, is that things like TCC & data collector pay rates and per diem meal allowances are low and have not changed in years (have they ever?).

Is this a sustainable situation? Are we relying too much on the fact that most of us in the field just love the work? For example, \$25 for dinner in NYC can sometimes be challenging unless the expectation is folks will eat at fast food restaurants. I accept it because I love it and because I figure that “dinner was going to cost me something no matter where I was, even if I was eating at home.”

So again, is that sustainable across the whole organization? If so, for how long into the future?

Reports we receive are very thorough and provide all of the information the board needs.

**5. Operations Management**

The executive director is responsible for day-to-day management. The executive director works with staff to develop, maintain, and use the systems and resources that facilitate the effective operation of NSIP.

How satisfied are you that:		Not satisfied		Satisfied		Not Sure	Comments
		1	2	3	4		
5-1	The executive director is knowledgeable regarding the operations of an effective office environment?						3.85
5-2	The executive director has assured NSIP has in place sound risk management policies including adequate insurance coverage?						3.85
5-3	The executive director has assured NSIP has in place accounting, payroll, and cash management systems?						4
5-4	The executive director ensures compliance with all legal and regulatory requirements?						4

**Comments:**

All of these procedures and systems have been explained to the board. We have met with personnel assisting with operations management. Documentation of these practices have been provided to the board. The ED has built and maintains a highly effective and efficient operational NSIP structure. This efficiency and effectiveness has contributed to the overall growth of the program, including a positive increase with regards to awareness, reputation and growth at the national level. My concern is that Mark is “out of the office and on the road” too long at one time. Office staff and personnel need to have his presence and support as often as possible. The ED’s reports to the board indicate that he watches these areas carefully and that he adjusts systems and/or coverage as necessary for the best interests of the organization.

**6. Board Perceptions of the Organization**

As the board reviews the performance of the executive director, it should also gauge its perceptions of the general operations and quality of NSIP in the following areas. The responses to these questions may help to focus the board and executive director’s attention on specific areas of strengths and limitations and will help to guide future NSIP development efforts.

How satisfied are you that:		Not satisfied		Satisfied		Not Sure	Comments
		1	2	3	4		
A	Administration & Operations?						3.85
B	Program Development & Delivery?						3.85
C	Financial Management?						3.7
D	Marketing & Public Relations?						3.85
E	Long-Range & Strategic Planning?						3.6
G	Client Services?						3.85
H	Overall Quality of Staff Performance?						3.85
I	Support of State Affiliates						4, 1NS

**Comments:**

Support for new teams is strong, but (other than the annual conference, which not all teams get to attend) support for teams in their 2<sup>nd</sup> year or beyond is left to local agencies (e.g., districts or state affiliates) and the TCC’s Betty will be missed-have we had any concerns voiced because she is not on the job as much?  
 Short term (1-2 years) planning is solid, but long-term planning needs to be addressed by both the ED and the board. Specific issues include ED succession planning and how to bring the SAM project to poor and rural districts.  
 Continuing kudos for Jim and Eric. While Mark is definitely the guiding force behind SAM, it simply would not be as good without them! Mark and the whole staff has always been supportive of anything I have tried to do.  
 Concerned about Mark having too many eggs in his basket.  
 Must be more persistent about succession planning. The ED has been both visionary and strategic in building the future of the program to ensure its continued expansion and impact.



**Overall Comments:**

NSIP is very fortunate to have such a dedicated ED. He goes above and beyond his job description to ensure the continued success and sustainability of SAMs.

NSIP continues to grow and positively impact school leadership across the nation. As this growth occurs, it ushers in different perspectives from the variety of contexts that now represent the NSIP family. With growth come unexpected challenges and a particular need for leadership. This ED exhibits the knowledge and skills necessary to not only satisfactorily meet these challenges, but build on them to enhance the program.

Mark does an excellent job as our ED. I worry about him at times because he is not Superman and needs to be sure to delegate more so that we maintain a strong base across the entire SAM program countrywide and so that Mark is not spread too thin.

Progress on national visibility continues to increase. Number of new schools and new states continues to increase. Reflection on practice and goals appears to be continuing. Overall, superior job performance!

Mark continues to support the mission and vision of NSIP. Additionally, he takes pride in the work and intends to improve teacher practice thereby increasing performance of students. An area that can be improved is providing a suite of professional learning opportunities for SAM schools and posting these on the website. These tools can support the SAM implementation and accelerate the principal's learning.

There is concern that the financial discussions with districts are varied as the leaders talk among them, there is not clarity with the rationale behind the differentiated fee structure. This is causing some districts to question the intentions of the program. A recommendation is for a more detailed accounting of the service cost.