

National SAM Innovation Project (NSIP)
Executive Director Performance Review

2019-Summary

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.

Except where stated otherwise, all items refer to actions or conditions since the previous Performance Review (approximately one year).

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 maintain a clear vision for NSIP.				3.8		Advances in TimeTrack & processes continue
1-2	The executive director and staff have worked with the board to maintain a clear mission.				3.8		Discussions & implementation appear to be moving forward and PD supports efforts
1-3	The executive director and staff have moved NSIP forward, or closer to its vision and mission.				3.8		
Comments: Perhaps consider a continual revisit and review of the vision and mission each time the board and ED meet since it is only twice a year. Perhaps grounding items on the agenda and the reports that are made on their connection to the vision and mission will keep all the work connected.							

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.				3.8		
2-3	The executive director and staff have improved professional development offerings and the national conference.				3.8		Need to focus more on equity in future trainings & diversity of presenters
2-4	The executive director and staff have improved TimeTrack™.				4		
Comments:							

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, maintained or decreased the number of participating SAM schools as consistent with the mission, vision and culture of NSIP.				3.6		Rough time financially for all, but good efforts to make it work depending upon district/school needs & availability Need to work on plan to encourage schools & districts to remain in project through an adjustment of fees, etc.
3-2	The executive director and staff have provided adequate and appropriate support for state affiliates.				4	1 NS	
3-3	The executive director and staff are building strong relationships with clients.				4		
3-4	The executive director and staff are increasing the visibility of and interest in the SAM process.				3.8		

Comments: The ED has a commendable capacity for building relationships with those in the program. He remembers every name and details about every school. This is certainly a factor in how participants feel about the program. Discussion of new clients and how we got them will be beneficial so we can see the options and recruitment methods.

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 to 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.				4		Good effort with unforeseen costs and issues with grant changes and national conference concerns
4-2	The executive director has maintained a fund balance that assures organizational stability.				4		But the line is getting smaller and needs to be watched closely.
4-3	The executive director presents financial reports to the Board and other information as requested.				4		
Comments: The ED maintains meticulous financial records and provides comprehensive and thorough financial reports.							

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 establishing and maintaining an effective office environment.				3.8	1 NS	Not in the office to know, but no complaints have been received.
5-2	The executive director has assured NSIP has in place sound risk management policies including adequate insurance coverage.				4		
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: The ED sees to the effective management of all operations

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 with:		Not satisfied		Satisfied		Not Sure	Comments
		1	2	3	4		
A	Administration & Operations?				3.8		
B	Program Development & Delivery?				4		
C	Financial Management?				3.8		
D	Marketing & Public Relations?				3.8		
E	Long-Range & Strategic Planning?				3.8		
G	Client Services?				4		
H	Overall Quality of Staff Performance?				3.8		
I	Support of State Affiliates?				3.8		

Comments: The ED might consider facilitating ongoing and targeted discussions with NSIP board on long-range and strategic planning to ensure the program not only continues the high quality services it currently provides but has plans for expanding and improving its footprint on education.

Overall Comments: The ED provides high quality and effective leadership of the project and ensures the delivery of quality services. His service to NSIP is greatly appreciated. It is an honor to serve on this board.