

National SAM Innovation Project (NSIP)
Executive Director Performance Review

2021

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. | | | | X | | |
| 1-2 | The executive director and staff have worked with the board to maintain a clear mission. | | | | X | | |
| 1-3 | The executive director and staff have moved NSIP forward, or closer to its vision and mission. | | | | 3.8 | | |

Comments: This work was completed this past year and everyone, including the ED, are totally collaborative with what was written. ED and Board did important work together this year reviewing and establishing updated vision and mission statements. These statements will form the basis for future decisions that need to be made. These two statements will also be important to evaluating the efforts of both the ED and the Board. Past year was difficult, but efforts with coffee hours and short PD sessions helped keep folks active. New processes helped cost and access which is part of the mission. This year has made it clear that while our mission remains relatively constant, our vision of how we should best accomplish that mission can adapt and evolve with the changing times.

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. | | | | X | | Mark adapted SAM implementation, coaching, training and support to the restrictions placed on everyone’s activities by the pandemic, and (to the surprise of all) some of those adaptations turned out to be improvements. Mark was open and flexible enough to recognize this and some of those adaptations will become post-pandemic SOP. Online and remote process have made it more accessible and cost effective. Important adjustments were made this year based on implementation during pandemic. |
| 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. | | | | X | | Mark created the coffee breaks in the spring and summer, and then morphed them into the SAM Talks during the school year. This high quality but low stress PD continues to get very positive reviews from SAM principals. Splitting the annual conference into two conferences and then ultimately cancelling the winter conference were difficult but good decisions. Coffee hours and presentations during Covid 19 was awesome. No national conference so the substitute was good alternative. Additionally, important adjustments were made this year based on providing effective PD during a pandemic. |
| 2-4 | The executive director and staff have improved TimeTrack™. | | | | X | | True, but the best is yet to come! From a board perspective, Mark has done an excellent job of supporting Eric Kramer and Jim Mercer. Continuous improvement of this tool happens on a regular basis. |
| <p>Comments: Implementation and support of NSIP this year was like no previous year. The ED effectively and successfully pivoted implementation and support based on challenges presented by the pandemic. Under the leadership of the ED, this year more than ever, NSIP proved that it can provide principals with critically valuable support regardless of the context. Can’t wait for the changes to TimeTrack!!!</p> | | | | | | | |

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. | | | | | 3.8 | A remarkable achievement, considering the national pattern of limited resources and cutting back on contracted services. Not sure of current numbers and Covid 19 impact but new price structure should help. Efforts have been made financially to assure SAM teams have options to purchase additional services (national conference). During these challenging times, Mark has done a great job in adjusting every aspect of the program to support sustainability and growth. |
| 3-2 | The executive director and staff have provided adequate and appropriate support for state affiliates. | | | | | 3 NS 3.6 | I have heard of no complaints, but I have no direct information on support for state affiliates. I am thinking this doesn't even need to be a part of the evaluation since we really have minimal state affiliates. Would love to figure out how to reignite the SAM process in KY. |
| 3-3 | The executive director and staff are building strong relationships with clients. | | | | | 3.8 | |
| 3-4 | The executive director and staff are increasing the visibility of and interest in the SAM process. | | | | | X | The experimentation with Google and the changes to the SAMsConnect web site access are notable attempts to make it easier for potential clients to find us. Efforts described during last board meeting should increase visibility. |
| <p>Comments: Growth was hard in Covid 19 time, but still progressed which shows amazing strength and versatility. The adjustments made by the ED in response to the pandemic was clear evidence of the quality of support that is provided. For many principals, NSIP was direct and vital benefit as they navigated very challenging conditions. The new landing page and changes made to the home page are great!!! I still believe the initial video is too long.</p> | | | | | | | |

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. | | | | X | | |
| 4-2 | The executive director has maintained a fund balance that assures organizational stability. | | | | X | | |
| 4-3 | The executive director presents financial reports to the Board and other information as requested. | | | | X | | |

Comments: Maintaining fiscal stability in a year when many businesses were forced to close and may not come back at all is truly an amazing accomplishment by the ED. He is to be commended and thanked for keeping NSIP successfully and effectively providing support and learning for principals all across the country. Mark has made significant adjustments to our fee structure, which have made it easier (even possible) for our clients to stay with us. There also have been significant changes in the way we deliver services (e.g., all coaching being done remotely) but these have not resulted in lower quality services. Outstanding effort with federal grants to keep NSIP afloat and keep from laying anyone off. Support from Wallace also signals long-term strength and recognition that they would come back to help a group they admire.

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. | | | | X | | |
| 5-2 | The executive director has assured NSIP has in place sound risk management policies including adequate insurance coverage. | | | | X | | |
| 5-3 | The executive director has assured NSIP has in place accounting, payroll, and cash management systems. | | | | X | | |
| 5-4 | The executive director ensures compliance with all legal and regulatory requirements. | | | | 4 | | |
| <p>Comments: NSIP is well managed the ED. In particular, the efforts of the ED throughout this year to support the NSIP staff is to be commended. He made every effort possible to provide for his staff in the face of many challenges. Once again, COVID 19 added stress to the process and payroll. Fiscal controls were put into place and cash management system proved sound. Efforts were phenomenal and beyond normal expectations.</p> | | | | | | | |

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 | | No t Sure | Comments |
|---|---------------------------------------|---------------|---|-----------|-------------|-----------|--|
| | | 1 | 2 | 3 | 4 | | |
| A | Administration & Operations? | | | | X | | |
| B | Program Development & Delivery? | | | | X | | New formats and processes appear to be a success. |
| C | Financial Management? | | | | X | | |
| D | Marketing & Public Relations? | | | | 3.8 | | New efforts are a plus |
| E | Long-Range & Strategic Planning? | | | | 3.8 | | Shifting of ideas and planning was necessary and accomplished. |
| G | Client Services? | | | | X | | |
| H | Overall Quality of Staff Performance? | | | | X | | |
| I | Support of State Affiliates? | | | | 3 NS 3.6 | | This is just a challenge that affiliates have not necessarily been able to improve either. |
| Comments: NSIP has had to survive a difficult and challenging year. Under the leadership of the ED, it successfully did and even in some ways, continued its tradition of continuous improvement. Solid year in a liquid situation. Ready to hear the plans going forward and which processes will be kept and which modified and satisfaction of school districts and clients. | | | | | | | |

Overall Comments:

Great leadership is not best demonstrated during easy times. Great leadership shows itself when there are significant challenges to overcome. The ED of NSIP successfully navigate NSIP through very significant challenges and proved himself to be a great leader. The simple fact that we still exist is a major victory in these times, and Mark’s leadership and willingness to adapt to changing conditions has enabled us not just to survive, but to thrive. Mark has once again done an amazing job to maintain NSIP through an extremely difficult period. His management and performance has brought NSIP through a very challenging time and revised services to meet the ever changing situation. I will truly miss working with the Board. Solid performance this year during trying times. Full approval of actions!