

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

**2020-Compilation**

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

Comments: Executive Director works very collaboratively with the board on all issues. TimeTrack has continued to improve and the vision of better coaching is continuing. Mark has kept focus on our vision and mission while at the same time keeping the organization flexible and adaptable. When schools closed it would have been easy to say we should shut down until schools reopened. Instead we shifted relatively seamlessly to online coaching and contacts and we helped our SAM teams to understand that TimeTrack and the SAM process could be at least as helpful to them in a time of crisis as they had been when everything was operating “normally”. Mark created the coffee break

PD sessions, which have benefitted all participants and kept us visible and relevant in these very confusing times. I firmly believe we are focused on a concrete mission and vision for NSIP

**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.				3.8		
2-2	The executive director and staff have improved SAM coaching, training and support.				3.8		TCC mentoring for all is helping to make sure TCC work is of consistently high quality. Doing a great job under the COVID situation
2-3	The executive director and staff have improved professional development offerings and the national conference.				3.8		Coffee Breaks are a fantastic addition to our PD offerings and the idea of holding two national conferences is scary but also a great adaptation to current circumstances. Not sure how to improve national conference. It is pretty awesome. Other PD during pandemic with coffee hour seems successful and is the result of relationships developed during national conference.
2-4	The executive director and staff have improved TimeTrack™.				4		Always seeing continuous improvement.

Comments: I love many of the speakers we have had at the national conference. I do believe we should always try to contact a wider range of presenter, especially those who are new to presenting to SAMs. Spring 2020 has provided unique challenges to NSIP, as it has to everyone. Efforts have been made to adjust by finding ways to continually serve those in the program.

**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.				3.7		Finances are a problem
3-2	The executive director and staff have provided adequate and appropriate support for state affiliates.				3.7	2	This seems to be less of an issue as the status of affiliates has changed, but one to learn more about

3-3	The executive director and staff are building strong relationships with clients.				3.8	1	The fact that we have many teams that have bounced back from the initial COVID confusion and remain committed to the use of TimeTrack and the SAM process is a testament to the strong relationships that Mark has built with our clients. Likewise, the number of participants in the coffee breaks shows that Mark has kept SAMs both visible and valued.
3-4	The executive director and staff are increasing the visibility of and interest in the SAM process.				3.7	2	New teams from undeveloped areas seems to suggest the visibility is out there.

Comments: This is challenging and hard to keep schools/districts committed to allocating funds for NSIP, especially as funding is being cut nationwide. The ED’s ability to build and maintain relationships with clients is to be commended. It is one of the most significant and positive aspects of NSIP. In addition, the efforts by the ED to support state affiliates is very much appreciated.

**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		Great effort to find grant to help support during this difficult time and loan to cover costs over long term. Next step is plan to address loan and costs of operations if number of teams is reduced.
4-2	The executive director has maintained a fund balance that assures organizational stability.				3.8		Costs and expenses are a concern with current national situation and school disruptions including funding sources.
4-3	The executive director presents financial reports to the Board and other information as requested.				4		

Comments: Mark acted quickly and got federal CARES Act loan and did not hesitate to consider switching banks when he concluded that was the most efficient way to secure NSIP’s financial health. His actions were bold and effective. This is an area of concern with the current pandemic influence. Budget ideas may need to be reviewed to address district shortfalls and current expenses. Spring 2020 has provided unique challenges in this area to all organizations. NSIP is in good hands thanks to the foresight and creative thinking of the ED.

**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.				3.7		Not there to determine but have heard no complaints.
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.				3.8		
Comments: NSIP is well managed by the ED. Corporate operations appear to be solid.							

**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		Appears run well and is flexible to handle different situations.
B	Program Development & Delivery?				3.8		The spread of SAMs is good, may need more ways to market. Delivery seems to go well with all of the support.
C	Financial Management?				4		Fickle times means difficult management. Review of national conference cost and charges may need to be reviewed based on current times and restrictions. May need to be smaller and maybe even some folks could attend virtually for less cost? Great move on loan that turns into grant and for bridge loan

							to hopefully make it through tough times for school districts.
D	Marketing & Public Relations?				3.7		SAMs seems to have positive image. Maybe charter and private schools may be future market.
E	Long-Range & Strategic Planning?				3.7		Who would have known COVID-19 would arrive and cause schools to close? Great steps with virtual coaching and virtual coffee breaks from presenters and friends from national conference.
G	Client Services?				4		
H	Overall Quality of Staff Performance?				4		Based only on performance seen
I	Support of State Affiliates?				3.7	2	Still would like to know more. Revisit this as it appears to be less relevant than when NSIP was created.
Comments: NSIP is a well-run and successful organization due to the effective and efficient leadership of the ED.							

Overall Comments: There is no manual for guiding an organization through these unique and utterly unpredictable times. Mark has stayed in tune and in touch with NSIP’s clients and staff and with the constantly changing situation in education, business and politics. Because of his leadership there is every indication that we will not only survive the COVID crisis, we will come out of it a stronger organization than we were before anyone ever heard of COVID-19. Times are tough and we will need to hunker down and plan where we can cut costs but not service and market SAMs as most valuable use of funds. Plan for reduced work will not be fun but needs to be considered so we can weather the virus and return strong when funds are more available. Plus, work to convince funds should go to continue SAMs as best use of limited funds. Overall great work during very difficult, stressful times. Mark has done well maneuvering during uncharted school seas. In challenging times such as this, the relative health of an organization is measured by the effectiveness of its leader. NSIP has not only found a way to continue its practice of providing high quality training and support but has found new ways to reach and connect with school leaders at a time when they need it most. The ED is to be commended for his efforts to lead NSIP through these unique times.