

National SAM Innovation Project (NSIP)
Executive Director Performance Review

2023 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 Several improvements in the vision have occurred
1-2	The executive director and staff have worked with the board to maintain a clear mission.						3.8 Work to enhance the mission and clarify it occurs every meeting
1-3	The executive director and staff have moved NSIP forward, or closer to its vision and mission.						4 It has become clearer and is used to guide discussions and actions

Comments: Appreciate how this has been a central focus of the work from day 1. The board and executive director explicated reviewed the mission and vision to ensure that it aligned to the evaluation and rubric. Much discussion was had on ensuring that the mission and vision were measurable and attainable. In addition, the board and executive director ensured that the mission and vision was shared with all stakeholders by displaying it vividly during the conference and consistently on the website. There are very intentional efforts taking place to look at data on the progress being made to move the work closer to the vision and mission. It’s good to see 1) our mission

& vision statements appearing on many NSIP/SAM documents & materials, and 2) those statements being used as reference points in the organization’s work.

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 Cost is down and numbers are up which is a strong indicator of success. The board and executive director spent time reviewing content that would be easily accessible on the website to provide demonstrations of SAM’s meetings, etc. so that stakeholders could access content as needed.
2-2	The executive director and staff have improved SAM coaching, training and support.						4 Mark/staff seem to be finding the right balance between pre-COVID “all in person” and COVID-era “all remote” training. Work with coaches and implementation specialists continues especially with online efforts.
2-3	The executive director and staff have improved professional development offerings and the national conference.						3.8 Conference continues to get better even with covid changes. Plus PD online has helped. The professional development offerings at the conference were hands on opportunities to work with practitioners who are currently implementing the SAM’s process in their schools. Evidence of best practices and opportunities to converse with
2-4	The executive director and staff have improved TimeTrack™.						3.8 Score is anticipatory. The old TimeTrack is serving without improvements, but the new TimeTrack has yet to be released. New edition is about to happen, plus additional expertise has been retained to assist with improvements. The TimeTrack has been improved and has been shared with stakeholders at the conference to demonstrate.

Comments: The use of the rubric assessment and the data it collects is being used to think about improvements to SAM coaching, training and support. Everything continues to get better and is always focused on meeting the needs of the SAMs and SAM Principal/Teams. Hoping the contracted specialist programmer will finally get us to a TimeTrack release. Kudos to Mark for finding this person. Good to see the TCC training planned for this summer. There is a level of demand for bringing back PD offerings like the SAM Talks and Coffee Breaks. Some of this comes from SAM principals who feel isolated & would love the opportunity to interact with other SAM principals more often than annually at the conference.

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.						4 New contracts continue to come in with schools and districts and new states. Data has been shared with the board on the number of SAM's team and the number of calendars are in use.
3-2	The executive director and staff have provided adequate and appropriate support for state affiliates.						3.5/2NS Wish we could try to revive NSIP in KY.
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 The executive director has personally worked to onboard new clients. New schools are always good indicators as are new states. The team has made a concerted effort to share the SAM's process. Each member is tasked to invite an interested colleague to the next conference.
<p>Comments: SAMs remains a significant and influential leadership development presence in a number of states across the country. The strong relationships with SAMs teams and coaches is a consistent characteristic of the process.</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.						4 The executive director has shared the progress of the financial planning & budgeting. There has been demonstrated financial growth. Efforts to protect assets and appropriate spending of funds are appreciated.
4-2	The executive director has maintained a fund balance that assures organizational stability.						4 Fund balance is in great shape for future needs.
4-3	The executive director presents financial reports to the Board and other information as requested.						4 The executive director presented the status of the budget to all board members in writing. Opportunities to ask questions were granted. Reports have been accurate and complete with explanations.
Comments: The executive director does exceptionally well at fiscal management.							

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 ensures the effective operations of the organization.						3.7 Variation in levels of execution has been identified. The executive director has made efforts to ensure that all teams function the same. This has been done through implementation of the rubrics.
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 System in place has balancing built in
5-4	The executive director ensures compliance with all legal and regulatory requirements.						4 Audit supports past work
<p>Comments: The executive director does very well at managing the overall operations of SAMs. Evidence to support each area has been presented to the board. Updates on legal matters, hiring, payroll raises, etc. have all been shared and documented in notes during board meetings.</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		Not Sure	Comments
		1	2	3	4		
A	Administration & Operations?						4 Operations seem to be going strong and growing.
B	Program Development & Delivery?						3.8 Repeat clients and new ones support the delivery of the program.
C	Financial Management?						4 Strong fund balance and operations support a 4.
D	Marketing & Public Relations?						3.7 Marketing can be enhanced. Efforts have been made.
E	Long-Range & Strategic Planning?						3.8 Plans can be more explicit identifying the role of each stakeholder and how their actions will help to meet the mission and vision for the organization.
G	Client Services?						4 Always accessible
H	Overall Quality of the Organization’s Performance						3.8
I	Support of State Affiliates?						3.7/3NS
Comments: The National SAM Innovation Project is a significant and influential factor in the lives of many principals in schools across the country. The work of executive director is a main reason for the success of the project and his efforts are appreciated!							

Overall Comments: Overall operations and growth are strong and consistent. Old clients are remaining for the most part and if not the Executive Director knows why and has tried to work on solutions to meet their needs. New clients are evidence of marketing and public relations successes and tracking. If not done currently, it might be good to track how and why new clients start. It seems that that is done somewhat and reasons tend to be past experience and moving SAMs to other areas when a former SAM principal begins work in a new place. Excellent year with excellent results. A full and positive 4 for performance. Mark and his staff have done an outstanding job and every year NSIP has improved and shown great success under Mark’s leadership. Another good year! Thanks to Mark for his excellent leadership. Also, thanks to Mark for his support of the Board of Directors’ work to evaluate and improve itself. Transparency is valued and honored as is openness to continuous improvement.