

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.						3.7
1-3	The executive director and staff have moved NSIP forward, or closer to its vision/mission, during the last twelve months.						3.7

Comments:

The addition of schools and states is a great effort on the part of the ED. Mark has always been available when needed and from the start he had a clear vision and mission for NSIP. The ED has a clear vision and mission for where the organization needs to go and works to communicate that consistently with the board. Mark has done a wonderful job messaging the SAM project. He continues to expand the project while maintaining its fidelity. The efforts to provide more coach training, adding more schools and creating publicity matched expectations. The mission and vision are clear enough for our early stages of existence as a non-profit, but they are not explicitly far-sighted. They need to be made even clearer, so that specific goals can be set, and they need to be more explicit about what NSIP wants to accomplish well into the future (3,5,10 years out). Mark certainly has moved us forward-my concerns are about how this movement is connected with an organizational mission and vision.

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.						4 1 Not Sure
2-3	The executive director and staff have improved professional development offerings and the national conference.						4
2-4	The executive director and staff have improved TimeTrack™.						4

Comments:

The SIS concept is good, but what lessons learned from it are being applied to implementation outside of “big city” contracts?
 The coaching guide and flip-book are already proving to be great resources.
 The online training is very effective way not only for providing training but also for creating and maintaining a sense of community among the coaches.
 TimeTrack support is excellent-the formal online tech support request process works very well, but Jim Mercer also does an incredible job of handling informal requests made by phone or e-mail. Everyone from state directors to small-school SAMs receives prompt, friendly service. The national conference continues to be one of the best professional development experiences available. Care must be taken, however, to make sure that the cost of the conference does not rise so high as to put the conference beyond the reach of schools in poor districts.
 It is clear Mark and the staff have excellent ideas for improving TimeTrack, but they also are open and enthusiastic about soliciting and implementing ideas from TimeTrack users in the field. Tech staff is to be complimented for consistently glitch-free roll-outs of upgrades.
 TimeTrack updates and improvements are good. SAM team ideas have been implemented. Additional help with scheduling and set up of teams has been implemented.
 The coaching sessions have been well set up and presented. The booklet and flipchart were excellent additions. The National Conference is growing and getting stronger and suggestions are being implemented. The TimeTrack updates are appropriate and on time.

The national conference continues to be a signature feature of the project. With the expansion of professional development options, the implementation will strengthen.

The TimeTrack roll-out continues to improve. Suggestions from principals and staff are honored as improvements are made.

Improvements to TimeTrack and the national conference have been impressive.

The national conference is one of the best administrators can attend. TimeTrack is developed beyond anything we could have imagined.

The addition of SIS has been the single most effective service we have implemented. It helps to ensure the sustainability of the SAM team. Also the training and support for coaches has been invaluable to the schools and their districts.

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.						3.5 1 Not Sure
3-3	The executive director and staff are building strong relationships with clients.						4 1 Not Sure
3-4	The executive director and staff are increasing the visibility of and interest in the SAM process.						3.85

Comments:

SIS implementation has been a great asset to the work of SAM teams. There is a long lasting service relationship established.

Growth has been unbelievable! The service, support and innovation of the organization speaks to the success and growth of the program. Everyone associated with the project has direct access to ED. This makes these school teams feel important and in turn they share this great experience with others.

Growth of NSIP is very contextual; in some places it flourishes and in others it is struggling. It appears more schools are being added at a reasonable rate. The clients appear pleased but not enough exposure to know more. No negative comments have been received. The visibility is growing with notes in articles and on websites.

Focus seems to be on growth through new, large districts contracts rather than on support for state affiliates (who were the early adopters and thus are the veterans in the project). State affiliates have not been forgotten, to be sure, and Mark and the staff are very responsive when requests are made, but state affiliates have not been a focus for providing support. Efforts seem to be focused on large client districts (either current or potential clients).

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?						4
4-2	The executive director has increased the NSIP fund balance over the last twelve months						4
4-3	The executive director presents financial reports to the Board and other information as requested?						3.85

Comments:

The fund balance has grown and is managed. The use of appropriate accounting and budgeting setups are present and appear sound. The financial reports have provided sufficient detail to understand the bottom line and how funds are being allocated.
 I'm please based on Sept, 2012 meeting.
 This is a definite strength of this current ED.
 Mark has done an outstanding job managing the organization’s finances and most importantly ensuring continued operations for the coming year and accounting for unforeseen circumstances.

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?						3.6 1 Not Sure
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?						3.85
5-4	The executive director ensures compliance with all legal and regulatory requirements?						4

Comments:

Need more phone calls answered by a person vs recording after transferred to #.
 Excellent job with return on payments quickly turned over.
 Production of tools and resources, management of the office and ensuring that we are fiscally sound and legally protected-Mark has done a great job!
 The ED has worked hard to ensure high stability and low risk status for the program.
 The records and documents received are sufficient evidence of good operations management. The entity has sound risk policies and appears in compliance with all necessary regulatory requirements.
 It appears effective and all efforts to obtain information and materials have been appropriate, but not sure on day to day 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 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?						3.85
D	Marketing & Public Relations?						3.7
E	Long-Range & Strategic Planning?						3.7
F	Fund Raising?						3.7 4 Not Sure this one is relevant
G	Client Services?						4
H	Overall Quality of Staff Performance?						4
I	Support of State Affiliates						3.5

Comments:

As a state affiliate belief that there is room to grow in this area. Publications tend to focus on national level costs, processes, etc. Concern that at some point we may lose state affiliate flexibility.

Board has been involved and has always kept the board informed of all NSIP activities. Great staff dedicated to clients and SIS team members

Continued development and strength of state affiliates is important to overall health of the program.

Long range planning & strategic planning needs to become more explicit about the long-range and about the organization's plans with respect to smaller, poorer districts and schools as well as with respect to larger, richer districts and schools.

Tech staff members are wizards and Betty is the best!

Supporting state affiliates needs attention in the future. These are in the "mature" stage of the project and the work they are doing should not be lost in the effort to grow the organization by writing contracts with large districts.

Perception is that it is run well. The program is moving forward, growing and improving at the same time. The marketing with the brochure, website and articles is excellent. The long-range plan is appropriate and controlled growth is in place. Client service appears good (might consider client satisfaction surveys). Staff has responded to all requests timely and efficiently.

Overall, I give a high rating for efficiency, growth and professionalism. NSIP is poised for excellent future growth and improvement.

Overall Comments:

Mark does an excellent job and is a real champion for SAMS. I am impressed that he is letting go of some things (ie training someone else who can train data collectors).

Overall things are going well, but we all-Mark, NSIP staff and the board-must be ever watchful to make sure that the soul of SAM/NSIP remains true as we serve ever more schools and as we continue the transition to being a non-profit.

Mark's vision and mission to provide principals with the time needed to focus on instruction has led to renewed focus on teaching and learning. States that participate are seeing a change in practice. Mark's keep awareness of the political undercurrents as well as the pressures to improve schools has led to the continued success of the project.

We are very fortunate to have Mark as the ED. With his institutional knowledge and being the creator of SAMs and NSIP provides us seamless leadership and the assurance of commitment and dedication of NSIP's ED.

Thanks, Mark, for incredible leadership through the growth of this project.