

Compilation of Scores and Comments 2015
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.						3.9
1-3	The executive director and staff have moved NSIP forward, or closer to its vision/mission, during the last twelve months.						3.9

Comments:

Direction looks good and everyone seems on board for the future and each step is consistent with stated mission, but there is still work to be done on our long-term vision for the corporation. Goals and direction are clear
 Positive steps have been taken to expand patent, logo, increase number of schools and improve PD Although the overall purpose for SAMs is clear, the vision for SAMs should continually be revisited. It is important to continue to grow as a project, to provide superior support and service to those who engage in the project but also to envision what it will look like 5 and even 10 years from now.

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.						3.9
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:

Addition of folks to work with schools after training is awesome. TimeTrack has improved as well. Online trainings are appropriate for content and frequency. SAM training in the summer in Louisville is successful.

Hard to improve the national conference, but it keeps getting better. Additional PD to schools and districts is good direction to go. PD reinforces the importance of the reflective practice of the process

Charts and graphs continue to improve. Schools indicate it is easier and more comprehensive. Notes and updates great.

This continues to be an area of strength for the ED. Improvements to enhance quality continue to happen as the process and tools become more user-friendly and useful. Over the past decade the project has grown and evolved in a superior product.

Implementation Specialist work is particularly impressive and beneficial

TTC training continues to be very helpful, both keeping the coaches up to date and helping to maintain a sense of community among the coaches. The periodic online training keeps coaches informed and energized between conferences.

While the national conference continues to explore new areas and to bring in new presenters, it has not lost its focus on SAMs, principals, and the work of improving schools by helping principals to devote more time to instruction. Although some still had to be turned away, the ED and staff managed to accommodate at least some of the overflow registrations

Time Track improvements are frequent and worthwhile. Every new feature has made TimeTrack a more effective tool for principals and SAMs. The established practice of taking seriously suggestions from SAMs and principals not only has made TimeTrack more efficient and effective, it has given SAMs and principals a sense of investment in the project as they see their suggestions become reality.

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.						4
3-2	The executive director and staff have provided more support for state affiliates.						4 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.						4

Comments:

Mark and the team has really positioned SAM in a way that states and districts are reaching out for services.

The newest publication, "It's About Time", is excellent and the plan for broad distribution should do a lot to broaden awareness of the project.

Efforts to expand seem to be going well. Big districts and states are great addition. Need to remember the little ones as well.

Positive reports from schools and administrators on client relationships

In general, the number of participants in SAMs continues to increase. While the breadth of usage expands, it is important to also think about depth. Are we clear on what deep implementation looks like? Is there a target we collectively plan for that demonstrates wide and deep implementation of SAMs as a project?

Brochures and new pamphlet are good tools that have been sent out to increase visibility as well as the articles and stories. Website is strong as well.

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?						4

Comments:

Finances are strong and budget planning is well thought out by ED. Management has been appropriately conservative.

Balance sheet is strong and appropriate

This is an area of strength for the ED. The project is very financially sound and the ED is very knowledgeable in this area.

Updates at meetings provide insight and information as necessary.

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?						4
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:

Appears well run based on limited interaction and contact. The fiscal side is well run and all safeguards appear to be in place. The system has backup safeguards and the use of outside accountants provides extra layer of accountability.

All indications are that the office runs smoothly and efficiently and that the office culture is positive.

The ED is excellent at operations management. He has assured that all parts of the project run well.

The ED’s reports to the Board indicate that he watches these areas carefully and adjusts systems and/or coverage as necessary for the best interests of the organization.

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?						3.9
B	Program Development & Delivery?						4
C	Financial Management?						4
D	Marketing & Public Relations?						3.9
E	Long-Range & Strategic Planning?						3.9
F	Fund Raising?						This was to have been taken out due to lack of relevance-OOPS! It’s gone for next year!
G	Client Services?						4
H	Overall Quality of Staff Performance?						4
I	Support of State Affiliates						4

Comments:

Transition of board members and executive director needs to be discussed completely to have a process in place before it’s needed.

Continues to enhance the work in affiliate states-ongoing process

Explore possibilities for ongoing local PD in areas that are not able to provide their own (ie in areas where there is no organization to provide something similar to a state or city conference)

PD for teams just entering the project is strong, but should there be additional PD for teams entering their 2nd year, or for veteran teams? Our intro training is strong, but should NSIP provide intermediate and advanced training as well?

In the future, do we need to help principals analyze the effectiveness of their work? What if they increase their time on instructions significantly and teacher practice and student performance do not improve? Do we have anything for principals who are “stuck” or to respond to funders (districts or agencies) who have questions if schools are involved in SAM for 3+ years with no improvement in student performance? Is this even a problem?

Short term (1-2 years) planning needs to be addressed by both the ED and the Board specific to ED Succession Planning and bringing SAM project to poor and rural districts.

Operations seem to be going well fiscally and timely. Districts and schools are satisfied with services and results.

The ED very effectively manages and leads the project. He is well-informed about the overall operations and provides leadership in its continued development.

Budget and balance are appropriate with room to grow and seed new ideas and development.

New ideas and advancement have improved SAMs from the original concept.

Training and correspondence with districts has been professional. Districts are satisfied with trainings and individuals sent for support,

Betty is simply the best!

Jim always handles school and TCC tech issues quickly and clearly. His personality and skills make him an excellent intermediary between the tech world and schools.

Eric not only keeps TimeTrack improvements coming, he and Him keep the system up and running. How many such software packages run well so consistently with so few glitches and so little down time?

Overall Comments:

The ED and NSIP staff have performed far above expectations. NSIP is successful and has reached such national recognition as a result of their outstanding work and dedications.

Overall, very satisfied on growth and performance. All areas of advancement and strategy have been implemented and moved forward. SAMs continues to mature and develop and grow appropriately based on its mission and design.

Mark continues to support schools nationwide through the SAM process. The outreach and the continued collaboration with The Wallace Foundation has increased visibility. Additionally, the increase of professional development offerings has helped to close the gap in learning for principals and SAMs during this process.

It's been an outstanding year for SAMs across the country and much of that credit goes to Mark and his staff. He is truly committed to continuous growth and improvement in the work of the National SAM teams as well as those of us who are in affiliate states. His enthusiasm and passion rubs off on everyone he interacts with.

I would like us as a board, with Mark present, to discuss the implementation of modifications to things such as the performance rubric (e.g., the addition of "uses TimeTrack as their primary calendar" at level 2) as well as the necessity (or not) for consistency in terms of training coaches and other things across the country. I, for one, would like to have an opportunity to offer feedback on some of those things before they are put into place IF the changes will affect all of our teams the rubric does.

The item we have discussed previously in terms of creation of a transition plan for SAMs leadership (ED and Board) is something I think we should spend some time talking about at a board meeting again as well.

Great year, overall! Lots to be proud about!