

National SAM Innovation Project (NSIP)
Executive Director Performance Review

2018-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.						3.6
1-2	The executive director and staff have worked with the board to maintain a clear mission.						3.6
1-3	The executive director and staff have moved NSIP forward, or closer to its vision and mission.						3.6 Concern for perception of organization and high cost and conference services
Comments: May be time to revisit vision & mission. With loss of some more established programs and the continued addition of new ones, the director should work with his board to ensure that both are clear on the future of SAMs (several years out). Program continues to move forward with fidelity. Each step & change is in line with mission & vision of the organization and fulfills the direction of the board.							

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
2-3	The executive director and staff have improved professional development offerings and the national conference.						3.8
2-4	The executive director and staff have improved TimeTrack™.						3.8

Comments: I have no doubt that implementation, coaching, training, support, professional development and TImeTrack continue with fidelity ensured by the director and his staff. Each of these items says “improved” and although there are new features to TImeTrack and to the national conference, it is far less clear whether there is evidence of improvement.
 TimeTrack continues to get better and better, quite a feat. I see the improvements in implementation and know it is getting stronger. The national conference doe 1)s a great job of tying things together and reinforcing the vision & mission (see category

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/NS Which is it supposed to be right now? Increasing, maintaining or decreasing (see comments below)*
3-2	The executive director and staff have provided adequate and appropriate support for state affiliates.						3.4/1NS
3-3	The executive director and staff are building strong relationships with clients.						3.6
3-4	The executive director and staff are increasing the visibility of and interest in the SAM process.						3.6

Comments: The addition of the grants in Illinois is fabulous and will increase the national exposure of SAMs. It is a great next step and I see others building on it such as GEAR-UP. The more others use SAMs in their grants the more exposure there is and the presentations and reports will highlight the work.

*There “appears” to be a shift in SAMs clientele from more established states/teams to newer ones. How to ensure longevity of use of SAMs might be something the director and board need to visit about in more detail.

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.						4/1NS
4-2	The executive director has maintained a fund balance that assures organizational stability.						4
4-3	The executive director presents financial reports to the Board and other information as requested.						4/1NS
Comments: The director keeps accurate reports and accounting of the fiscal status of NSIP. The grants provided an opportunity for the organization to re-evaluate the fund balance and methods of working with outside groups. The learning opportunity will benefit the program in the future. The solutions offered by the director were appropriate and thought out and provided the security needed.							

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.						3.8
5-2	The executive director has assured NSIP has in place sound risk management policies including adequate insurance coverage.						3.8
5-3	The executive director has assured NSIP has in place accounting, payroll, and cash management systems.						3.6
5-4	The executive director ensures compliance with all legal and regulatory requirements.						3.8
Comments:							

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 These appear to be in order
B	Program Development & Delivery?						3.8 Operations appear to be effective and efficient
C	Financial Management?						3.8 NSIP seems financially healthy
D	Marketing & Public Relations?						3.8/1NS I’m less knowledgeable on how and when this occurs
E	Long-Range & Strategic Planning?						3.5 There appears to be a shift towards newer teams and states
G	Client Services?						3.6 States are working with a new US ED administration and ESSA. SAMs needs to be responsive to the challenges this brings for states
H	Overall Quality of Staff Performance?						3.8 Operations of the office staff seem effective
I	Support of State Affiliates?						3.6/1NS (see note above) ESSA is bringing about a new era of state accountability

Comments: As states wrestle with changing US ED directions and requirements of ESSA, it is important that NSIP be well-positioned to assist states in this area. This may require some rethinking of long-standing protocols and procedures of the SAMs process. Doing this while maintaining fidelity to NSIP is key.

The program is solvent and appears to provide services in a professional manner. When disruptions occur, the board is notified and solutions are proposed. My experiences with staff are limited but always professional and appropriate. The long range plans are in line with the mission and vision and workable. The reputation of the project is strong and that is due to the director and staff including all the TCC’s and Implementation Specialists.

Overall Comments:

The Illinois implementation was a huge all-hands-on-deck effort. Mark and Co. managed the challenges with aplomb and good humor and while at times things may have been hectic behind the scenes, everything looked calm, controlled and professional to our clients.

Tech support & TimeTrack upgrades continue to be one of our greatest strengths. As a coach I occasionally have teams that have difficulties with TimeTrack. Jim Mercer, in particular, is very responsive, sometimes getting us the information we need to fix the problem even before our coaching session ends. Tech support doesn't get any better than that and ours always makes a good impression on our clients. Kudos also to Eric Kramer for excellent software design and programming and for a steady stream of upgrades. Overall, I am convinced NSIP is operating as a strong non-profit that is continuing to honor its vision and mission. It works in many different situations which is due to the performance of the director and the staff. It has grown and changed over the years while staying true to vision and that is not the norm for many organizations. The ability to adapt and change to meet client needs while maintaining the integrity of the program and its mission to help principals change their practice to become more instructionally driven is outstanding. I fully support and approve the work of the director, the staff and the board as the various changes have been addressed.