

**Executive Performance Management and Development**

Habitat for Humanity

Name: Teresa Bianchi \_\_\_\_\_

Date: 09/11/17 \_\_\_\_\_

Position: Executive Director, Habitat Buffalo

Time in Current Position: May 2016 to June 30, 2017 \_\_\_\_\_

**Part I: PERFORMANCE - Expected Results (as identified by the Executive and Board prior to evaluation period)**

Objectives Specific Goals	Expected Results Specific, descriptive end results expected, defined in terms of quantity, quality, cost, and time
<b>1. Performance on Budget (and Goals within the budget - Key Drivers)</b>	Teresa inherited a budget process that was not fully developed.
a. Development	Secured 3 new \$80,000 donors for house building support. <ul style="list-style-type: none"> <li>o One with the potential of yearly renewal.</li> <li>o One with the potential of multi-year gifts.</li> <li>o One payment delayed till December.</li> </ul>
b. Restore	<ul style="list-style-type: none"> <li>- Assessed operations, identified areas for improvement, developed solutions, and implemented changes.</li> <li>- Identified and internally recruited leadership, mediated staff transitions, secured support / buy-in of ReStore staff.</li> <li>- Developed restructuring plan for Restore Staffing</li> </ul>
c. Construction	<ul style="list-style-type: none"> <li>- Procurement: Established management and staff purchasing authority and responsibilities, reduced number of staff authorized to make purchases, consolidated purchase of common (shared) supplies.</li> <li>- Job Costing: implemented tracking procedures to appropriately account for construction costs</li> <li>- Implemented new house pricing procedures to improve the sustainability of the organization</li> </ul>
d. Staffing (Allocation of Resources)	Staffing - The budget was a departure from prior in that it included new staff positions that were meant to help shape the future of the organizations. Teresa utilized the budget to hire appropriately. She also made strategic decision to reduce staffing at Restore
e. Operations	<ul style="list-style-type: none"> <li>- Instituted DonorLink system to establish tracking of donors</li> <li>- upgrades to office Computer and Telephone systems</li> <li>- Transitioned HR outsourcing from Olcott to ESC</li> <li>- Strengthened purchasing controls – rescinded authority to contractually encumber Habitat, better documentation and reporting of activity</li> </ul>
f. Financial Controls	<ul style="list-style-type: none"> <li>o Directed processes to accurately and completely document financial activity – purchases, donations, and cash flow.</li> <li>o Facilitated proforma cash flow projections and continued development of meaningful financial reporting</li> <li>o Introduced job costing for home construction</li> <li>o Developed and submitted a balanced budget for the upcoming year</li> </ul>

## Executive Evaluation Form

<b>2. Managing the Organization (Staff Management and Development) - Utilize the Staffing Plan</b>	
a. Staff Reviews and salary actions	Current Staff were given feedback. New staff will be part of the process in the coming year.
b. Objectives and development plan for staff	Counseled Manager and supervisors to recognize and accept their role in respect to the impact on the organization as a whole
c. Delegation	Re-directed coordinated integration of support committees into operations She should have delegated responsibilities to staff and volunteers to be more effective. She took on more obligations than were necessary.
d. Hiring and firing, placement of resources in the organization	Successfully recruited and integrated 4 key personnel – Controller, Family Services Manager, Development Manager, and Volunteer Coordinator
<b>3. Community Engagement (soliciting cooperation from others)</b>	
a. Government (City of Buffalo (Primarily), Erie County, NY State)	Established / Re-Established partnerships with key business and government contacts to build a pipeline for funding and property acquisitions Will need to continue working these partnerships moving forward.
b. Foundations	Established partnership with Oshiei Foundation to develop good Governance methods
c. Donors	
d. Groups (Churches, Schools)	
e. Volunteers	Seemed to work effectively with volunteer teams, e.g. working on Woman's Build Week, Bills Day in June of last year
<b>4. Personal Development</b>	
a. Leadership Buffalo	Began the Leadership Buffalo Program. Scheduled to complete at the end of 2017
b. Conferences (NYS-HFH , HFHI)	Attended HFHI conference and NYS-HFH ED Seminar and conference
c. Other	
<b>5. Other specific objectives (generally one time objectives)</b>	
a. Transition of Leadership - Smooth transition to role of ED	1. Worked to stabilize Operating Environment 2. worked implement the new Staff based Organizational model presented by the Board
b. Crisis Management	1. There was an injury at the North Restore with an employee and Teresa effectively engaged Alcott and members of Executive Committee to help manage the injury. Deployed Jim Eaton to develop accident policies 2. Dealt with Ralph Brown issue professionally 3. Cash Flow issues - instituted plans (including Restore restructuring) to manage the situation
c. Other	

## Performance Management and Development

**Part II:****Name of Evaluator:** Executive Committee**Date:** 09/11/17**Success Factors**

Success Factors are the foundation for HOW we achieve business results. These specific behaviors form the basis for on-going learning and development

Mission and Core Values	Consistently	Usually	Occasionally	Rarely
Makes strategic decisions that forward the Mission of the organization	x			
Integrates the Core Values of Habitat for Humanity into plans, decisions, and actions	x			
<b>Comments and Elaboration on above - Give concrete examples:</b> 1. Regularly provided updates on changes to Habitat Buffalo based on policy changes from Habitat International. 2. Teresa has a broad Habitat education and passion for the Habitat mission. She has helped our affiliate a great deal in this regard.				
Achieves Results	Consistently	Usually	Occasionally	Rarely
Meets performance targets		x		
Accepts responsibility for results		x		
<b>Comments and Elaboration on above - Give concrete</b> 1. Realized that donations were below target and accepted responsibility for shortfall 2. Staff development is ongoing. Teresa has a lot on her plate and needs staff to help more				
Functional Effectiveness	Consistently	Usually	Occasionally	Rarely
Understands all elements of Habitat for Humanity, including vision, goals, objectives, and operations	x			
Takes an overall business point of view and encourages all functions to work together to achieve Habitat for Humanity's objectives	x			
Balances the objectives of the Board, finance, marketing and operations		x		
<b>Comments and Elaboration on above - Give concrete examples:</b> 1. Good at trying to let all departments know what changes are being made but may still need to focus more on marketing and construction operations. 2. Teresa sometimes comes across as to "corporate" and not caring or compassionate. 3. Needs to communicate Priorities across the organization				
Decisiveness/Judgment	Consistently	Usually	Occasionally	Rarely
Makes appropriate recommendations and decisions, exhibits good judgement, takes action, or makes commitments	x			
Makes decisions on "tough" problems (e.g. those that have the potential for unpleasant personal or organizational consequences)	x			
<b>Comments and Elaboration on above - Give concrete examples:</b> 1. Made tough hiring/firing decision on 1st controller and also made difficult decision to restructure Restore operations leading to elimination of a position 2. Teresa has dealt with some difficult situations in her first year. She has done well with them.				

## Executive Evaluation Form

Vision	Consistently	Usually	Occasionally	Rarely
Has a vision of future goals, directions, and priorities of Habitat for Humanity and communicates it in such a way that others understand and are committed to achieving it		x		
Incorporates Habitat for Humanity's vision, goals, and objectives into performance plans and objectives		x		
<b>Comments and Elaboration on above - Give concrete examples:</b> 1. Good at understanding the Habitat International vision but need to better articulate to Board and staff on how that applies to daily operations. 2. Teresa knows what she wants to do, but sometimes the staff may not understand her priorities (i.e. getting the Punch list items completed on Wende in a more timely manner)				
Strategic Thinking and Perspective	Consistently	Usually	Occasionally	Rarely
Takes a long-term, broad view of situations when making decisions and taking actions		x		
Reviews issues and alternatives and selects those that will have the most significant impact on the organization in the long run		x		
Understands the difference between long-term strategic plans and short-term, tactical plans		x		
<b>Comments and Elaboration on above - Give concrete examples:</b> 1. It seems like we are still moving back and forth between tactical actions and longer term strategic plans. 2. She is still learning in this area				
Managing Performance	Consistently	Usually	Occasionally	Rarely
Ensures that management, professional, and personal development goals or objectives are established for staff		x		
Develops skills and competencies in others through assessing strengths and capabilities, identifying development needs, providing challenging tasks and assignments, and providing other appropriate developmental opportunities		x		
Acts as a coach to others to enable them to meet development objectives and/or assume broader or higher responsibilities		x		
Deals decisively and appropriately with managers and other key personnel, making decisions that reflect sound business thinking		x		
Holds subordinates accountable for achieving their targets and objectives		x		
Makes hiring/staffing decisions that result in high quality performers who are valuable talent for Habitat for Humanity	x			
<b>Comments and Elaboration on above - Give concrete examples:</b> 1. Teresa needs to get more out of her team. The newer hires seems to be learning at an appropriate pace but the legacy employees seem to need to be motivated to perform.				
Managing Change	Consistently	Usually	Occasionally	Rarely
Recognizes the need for change and adapts organizational values, objectives, strategies, structures, and operating plans in response to changing Habitat for Humanity conditions		x		
Revises management processes or style to lead and support the required change and achieve desired results			x	
<b>Comments and Elaboration on above - Give concrete examples:</b> 1. I think Teresa understands the need to change parts of the organization but is still struggling to sell that message to her whole team. Some of the team seems to be heavily engaged in change, e.g. Matt and Padraic while others seem to be dwelling in the past. 2. Teresa has been constantly faced with change since she arrived. How she handles volunteers is important in this process				
Integrity and Company Ethics	Consistently	Usually	Occasionally	Rarely
Conducts all Habitat for Humanity functions and achieves desired results while demonstrating behaviors that are consistent with the values of Habitat for Humanity and in full compliance with the law	x			
<b>Comments and Elaboration on above - Give concrete examples:</b>				

## Executive Evaluation Form

Leadership	Consistently	Usually	Occasionally	Rarely
Presents oneself in a way that inspires trust, competence, and confidence	x			
Interacts with Stakeholders (patrons, donors, volunteers, employees, the community) in ways that enhance understanding, respect, and support for Habitat for Humanity		x		
Communicates in such a way that others are committed to achieving Habitat for Humanity's goals		x		
<b>Comments and Elaboration on above - Give concrete examples:</b> 1. Teresa is still selling herself to her team and volunteers. She has made good progress but may need to show a little more empathy to ensure all parties feel appreciated for their efforts. 2. Team commitment waive any salary action in light of budget concerns speaks well to her leadership				
Teamwork and Relationships	Consistently	Usually	Occasionally	Rarely
Creates an environment where diverse groups feel comfortable and are encouraged to participate	x			
Fosters cooperation within and across groups in order to accomplish Habitat for Humanity's objectives		x		
Encourages open, honest, and constructive communication with stakeholders		x		
<b>Comments and Elaboration on above - Give concrete examples:</b>				
Managing Stakeholder Relationships	Consistently	Usually	Occasionally	Rarely
Focuses on, and demonstrates a commitment to stakeholders		x		
Develops and maintains constructive relationships with stakeholders		x		
Understands the impact of, and reacts appropriately to, changes in external forces		x		
<b>Comments and Elaboration on above - Give concrete examples:</b> 1. We need to do more to engage our volunteers and identify donors. Not holding the annual Spring dinner may have been a lost opportunity to maintain good will even if it was not event to make money.				
Overall Evaluation	Above Acceptable	Acceptable	Working Towards Acceptable	Unacceptable
	x			

## Employee Comments

The employee's signature indicates that the employee has seen and participated in this appraisal.  
 It does not indicate agreement of the appraisal content.

## Signatures and Date

## Executive Director

*Teresa Bianchi* 9/20/17

## President of the Board

*Shaunt* 9/20/17

