**Employee Name:** Lisa Hanson-Braun

**Job Title:** Director of Advancement

**Date of Performance Review:** 3/25/24

**Definitions**

**Outstanding:** Performance is distinguished and far exceeds requirements of the job.

**Exceeds Expectations:** Performance is exceptional and usually exceeds job requirements.

**Meets Expectations:** Meets all job requirements.

**Needs Improvement:** Performance is below the standards and requirements of the job.

**Not Effective:** Performance is well below requirements of the job and is unacceptable.

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|  | **Outstanding** | **Exceeds Expectations** | **Meets Expectations** | **Needs Improvement** | **Not Effective** |
| **Financial Management** |  |  |  |  |  |
| Works with Executive Director on the annual budgeting and planning process |  |  |  |  |  |
| Comments: | Enter Comments Here | | | | |
| Runs fiscal reports as necessary for the budgeting and audit processes |  |  |  |  |  |
| Comments: | Enter Comments Here | | | | |
| Creates monthly budget and program reports for the Board of Directors meetings |  |  |  |  |  |
| Comments: | Enter Comments Here | | | | |
| Prepares documents and reports for audit process |  |  |  |  |  |
| Comments: | Enter Comments Here | | | | |
| Maintains all financial accounts, ledgers, and reporting systems and documents business transactions in accord with accepted accounting principles, including maintaining records of receipts/revenues, disbursements and expenses |  |  |  |  |  |

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| Clearly communicates monthly and annual financial reports; collates financial reporting materials for all donor segments, and oversees all financial, project/program and grants accounting |  |  |  |  |  |
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| Works closely with the leadership team providing financial reports to create maximum efficiencies, evaluates risk and identifies new opportunities |  |  |  |  |  |

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| Maintains internal controls and safeguard for receipt of revenue, costs, and program budgets and expenditures |  |  |  |  |  |

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| Reviews financial tracking and escalates concerns to Executive Director |  |  |  |  |  |

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| Attends Fund Development meetings monthly and documents minutes of meetings |  |  |  |  |  |

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| **Grant Management** |  |  |  |  |  |
| Oversees all project/program and grants accounting; prepares financial reporting materials for awards and grants |  |  |  |  |  |

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| Researches potential grants |  |  |  |  |  |

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| Writes grant requests |  |  |  |  |  |

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| Utilizes systems to gather and track data on program outcomes |  |  |  |  |  |

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| Attends trainings as required by grants |  |  |  |  |  |

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| **Donor Relations and Communications** |  |  |  |  |  |
| Manages donor database, including sending thank you letters to donors |  |  |  |  |  |

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| Creates and monitors fundraising event budgets |  |  |  |  |  |

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| Provides content to be included in communications to donors and fundraising appeals |  |  |  |  |  |

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