The US Grail Council
931 O'Bannonville Road
Loveland, OH 45140
683-2340 March 31, 2019

March 31, 2019
End-of-Year Evalutaion
Executive Director: Terrie Puckett

PRIMARY RESPONSIBILITIES

Council Support

- Supports Council in its providing leadership and accountability for the mission of the Grail
- Supports Council in its establishing national policies and a strategic plan
- Supports Council in its responsibility to meet the Council's strategic goals

Movement Support

- Supports Resolutions: to be an anti-racist organization and to foster spiritual community as the core of the Grail
- Ensures that Grail members, groups and committees have the resources necessary to live out the Grail mission

Communications

- Ensures clear and articulate internal and external communications that reflect and further the Grail mission, vision and values
- Communicates regularly and timely with Council, staff, members and volunteers through various medium including phone, email, in person, videoconferencing and other outlets
- Engages in public relations to further the mission and vision of the Grail
- Oversees website, Facebook, YouTube and all other forms of social media and media creating and maintaining a consolidated and unified organizational identity

Finances and Operations

- Collaborates with Council, Finance Committee, Treasurer and oversees the work of the Finance Manager to determine budgetary needs and monitor operations to ensure they stay within set budget guidelines
- Maintains efficient and current office procedures and systems
- Consults with licensed professionals to meet the needs of the organization
- Maintains the physical assets owned by The Grail at levels determined by the strategic goals to include regular maintenance, revitalization, housekeeping, basic upkeep, and emergency response
- Collaborates with designated committees and Council for the efficient sale and close of assets providing planning, staffing, resources and oversight as necessary, to include treatment of archives, collections, equipment and land/buildings

- Maintains all legal documents as related to the functioning of the Grail including personnel records as outlined in the Document Retention Policy
- Hires staff, conducts regular performance evaluations and terminates as appropriate
- Supervises the staff (permanent, on-call and temporary) and volunteers necessary to effectively meet strategic goals
- Provides collaborative style leadership to motivate staff to accomplish tasks, facilitate dialogue, accountability, responsible participation and decision-making
- Handles complaints and settles disputes arising in day-to-day operations working with Personnel Committee to resolve disputes involving leadership
- Assists staff and volunteers in relating their specialized work to the totality of The Grail
- Encourages staff and volunteer development and education

Development

- Oversees Administrative Assistant to ensure the recording and timely acknowledgment of contributions, including year-end tax receipts; updating of donor database and the maintenance of donor files
- Identifies and explores outside funding sources in support of Grail projects, programs and events
- Maintains and develops connections in the community through various outlets in order to secure support, collaborations and resources needed to achieve strategic goals

Council Goals:

Sell land on Southside of GV

- Provided information and tours of space to potential buyers
- Gathered documentation and research as requested
- Facilitated the sales process
- Ensured asset policy followed in distribution of funds
- Made initial contact with Loveland Schools re: sale of property
- Assisted Council in messaging sale to members and public (ongoing)

Close down retreat center functions at CW

- Secured assistance from personnel committee re: CW staff issues
- Managed CW staff onsite through visits and electronic means
- Facilitated communications with Cornwall proposal group
- Secured legal counsel regarding issues surrounding Cornwall
- Managing the transition following the completion of staffing at CW
- Managing the transfer of the CW archives to Loveland and Notre Dame as appropriate
- Managing the closure of the retreat center including household possessions as appropriate.

Communication with members and non-members

- Provided talking points and background data for NGN, Gumbo, etc.
- Published monthly friends of the Grail news
- Continued twice monthly Friday news and Gumbo
- Answered calls, e-mails in-person inquiries, questions, requests for help in timely manner

- Continued to provide all written correspondence to members and outside entities
- Maintained communications of all types internal and external
- Continued sending birthday cards and "thinking of you" notes

Actively advance the mission of the Grail in the US

- Created opportunities to learn more about the Grail and understand the connection with the UN SDGS
- Developed pop-ups for community to connect on space and virtually (?)
- Fostered agricultural learning lab program for responsible and feasible use of GV land
- Terrie has an amazing ability to reach out to the community and to encourage volunteer opportunities while educating them as to who and what the US Grail is. She is passionate about the Grail and what it could be. Her networking is creating opportunities to connect with other non-profits including schools to achieve goals together.
- Fostered the arts through the recent art show in the Oratory, which featured the work of William Schickel and art from the Grail collections. The exhibit told the history of the Grail, where we have been and what we have done.
- Established connections with the Boy Scouts and the Eagle Scout program in the learning labs. One project teaches visitors how to create their own organic garden. As well, they created a new labyrinth near the oratory that visitors, school children, and members are encouraged to use. Finally, they built a kiosk at the trail head that provides information about the Grail and information about the trails.
- Successfully networked to make connections at the last 2 meetings of the Commission on the Status of Women. Terrie sees possibilities for the Grail to do more mission work through the United Nations Sustainable Development Goals and hopes to foster more connections, especially with young women.
- Terrie and her staff are encouraging and helpful to all Grail members. They check on older members and send cards to let them know they are not forgotten. They are also in touch with the elder care work group and let them know when an issue arises with an older member.
- Supported Council. Terrie provides us with the information we need to conduct our business and make decisions. She participates on calls as needed, works with committees, and represents us in meetings with lawyers, and other professionals. Her reports are clear and our questions are always answered in detail.
- Terrie has been able to do all of this while making trips to NY to close Cornwall, work with the Cornwall staff, meet with local entities and members, and attend the Commission on the Status of Women (CSW) at the United Nations.

What we asked Terrie to focus on for March, 2018-2019:
Consolidation and Branding of a consolidated Grail:

- Formed a Communications Committee to review content for a consolidated website, which is still in process.
- Membership Giving altered to meet the reality of a consolidated Grail
- Budget altered to meet the reality of a consolidated Grail

Responsible transition of Cornwall:

- See above under close down retreat center at CW.

Responsible use of Grailville

- See above under Advance the Mission of the Grail.

Support to Council and Working/Affinity groups

- See above under Advance the Mission of the Grail

Resolutions: to be an anti-racist organization and to foster spiritual community as the core of the Grail:

- In hiring, Terrie consistently seeks out women and persons of color. She finds Loveland to be a difficult location as minority-owned businesses are few in Loveland and as few in Cincinnati—where there are minority businesses—wish to travel to Loveland.
- Fostering spiritual community within the Grail has proven to be a challenge in general as the Spirituality Committee dissolved following the establishment of the Affinity Group on Fostering Spiritual Core, and the Affinity group has not done more than what has happened in the past. As well, the Affinity group has rejected efforts made on the part of the Council to engage members in discussion about spirituality.

Overall Performance: Outstanding. Over and above all that is expected.

What we would like to see in the coming year:

- CW Transition
- Sale of South Side property
- Consolidation of the Grail
- Resolutions: to be an anti-racist organization and to foster spiritual community as the core of the Grail
- Settle Cemetery Matters and Process
- Continuing Archives Transfer to Notre Dame
- Strengthening of your relationship with members outside Loveland in other parts of the country.
- Continued networking of members doing similar work.
- Setting up more systems to involve the Grail membership is desired, as you are doing with *Weaving the Threads* project.
- Systems for more information shared among regions

Comments by Employee:
See attached.
Professional Growth Goals (including training):
See attached.

Approve Salary Increase: Yes $65,000

Pamela M. Cobury

Signature NLT

Signature NLT

Signature Employee

THE GRAIL

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End-of-Year Evaluation
April 23, 2019

Comments by Employee:
I appreciate the confidence Council has in my abilities and vision. As noted in face-to-face conversation, I am only as good as my team, so I also appreciate Council's faith in their abilities as well.

Per our conversation, I agree wholeheartedly that we need to do more to include Grail members in all geographic locations. We will need to ramp up our efforts over the next year. I look forward to visiting regional meetings, and developing an outreach plan that the office can implement consistently and measurably.

We will continue to advance the goals for 2019 as approved by Council December 2018.

Thank you for this opportunity to serve the Grail in the US.

Professional Growth Goals:

1. Keep the GA resolutions and the UN SDGs "top-of-mind" when planning, purchasing, hiring, recruiting—fully LIVE the mission.
2. Continue seeking out opportunities to learn about grant writing and development best practices in order to prepare for the near future when The Grail is ready to go down that path strategically. Several organizations with which we are affiliated offer courses (webinars, in person workshops tc.) the issue is time/timing. This gets back-burnered when trying to schedule.
3. Continue developing relationships with like-missioned organizations at the National level especially. This will involve highly organized logistics for travel and outreach as many of the organizations are NOT located near Loveland. In preparation for this, will need to create our "package" (who we are, where we are going, etc.) so that the RIGHT organizations are reached (targeted vs. scattershot). Will seek out professional courses/webinars etc. that address C-Suite relationship building.
4. Understand deeply the goals and structure of The International Grail so that we can identify ways/paths of growth for US Grail. This will include not just The Grail, but an understanding of the UN (opportunities abound), and other multi-national umbrella organizations.