

Compilation of the NREA GM Performance Appraisal

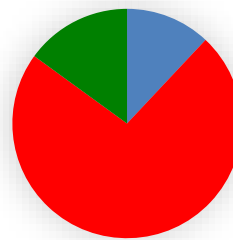
Evaluations were sent out to representatives of the 34 Member Systems.
Twenty-six Member Systems responded for a response rate of 76%

Part One - Performance Appraisal and Performance Summary

Leadership

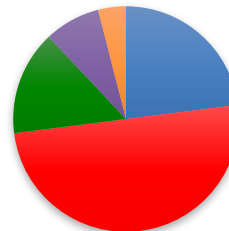
Demonstrates ability to effectively guide the organization through the use of clear vision, articulated corporate mission, goals and strategies to adjust to changing environmental factors.

5	Excellent	12 %
4	Good	73 %
3	Acceptable	15 %
2	Needs Improvement	0 %
1	Poor	0 %
D/K	Don't Know	0 %
N/A	Did Not Answer	0 %



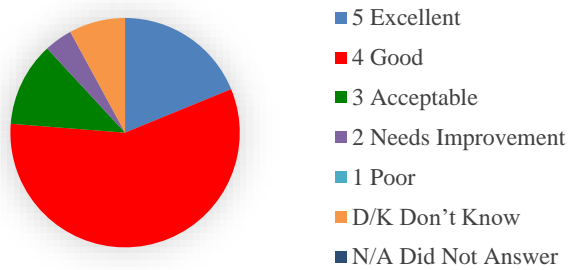
Evaluates all potential solutions to meet the needs of the business.

5	Excellent	23 %
4	Good	50 %
3	Acceptable	15 %
2	Needs Improvement	8 %
1	Poor	0 %
D/K	Don't Know	4 %
N/A	Did Not Answer	0 %



Plays a leadership role with related associations.

5	Excellent	19 %
4	Good	58 %
3	Acceptable	12 %
2	Needs Improvement	4 %
1	Poor	0 %
D/K	Don't Know	8 %
N/A	Did Not Answer	0 %



Comments:

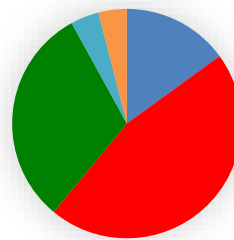
- ▶ In my time the best leadership we have had at the statewide.
- ▶ Sometimes proposals don't seem to be fully vetted prior to presentation and plans have to be postponed to gather more information or think through additional concerns.
- ▶ Overall, Rick is doing a fine job leading the NREA organization. He is adhering to the mission of NREA. He is active with other organizations like NPPD and NRECA. He is rated low regarding potential solutions to meet the needs of the business because of the lack of financial statements being available to the NREA members for a lengthy period of time, which is the outcome of issues in accounting.
- ▶ Under Rick's leadership, the organization is on the right track.
- ▶ Rick has been doing a good job with leading the organization through changes that needed to be made both internally and externally with the political environment changing outside of the NREA.
- ▶ I feel Rick does a great job with playing two rolls and it can be a bit tricky as he has to look out for Custer's interest and the Statewide. Rick is very informed and can answer questions when asked. He brings up topics and lets the systems lead the discussion. He will voice his knowledge on the topic when questions are asked. Great leadership in a complex situation!
- ▶ Rick is having to put together a broken vase that he didn't break. We believe he is guiding the organization effectively given the circumstances.
- ▶ Rick's experience as a system manager is a benefit to the NREA and provides the leadership needed.
- ▶ Leadership has continued and has been engaged legislation on company functions. Has a good sense for business and leadership that is needed in the company.
- ▶ Seems to be at associated events but seems like not enough time is given to prepare for the events.
- ▶ Rick stays on top of everything very well.

- ▶ It seems that Rick doesn't have enough time to provide the association with the leadership it is clearly missing. It is a full-time job and we knew going into this situation that it would be challenging. Rick arranged a good annual meeting in Kearney.
- ▶ The 2022 numbers, despite the issues involved, should have been timelier. This may have been better if we had a full time manager.
- ▶ Doing a nice job. We all know this was a tough situation and Rick has done a nice job. Just like all of us, there is always room to improve.
- ▶ Good leadership skills.

Board Relations

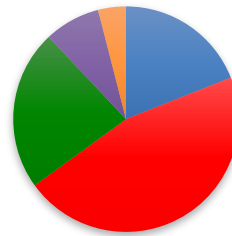
Keeps Board informed of important industry issues and the performance of the Association.

5	Excellent	15 %
4	Good	46 %
3	Acceptable	31 %
2	Needs Improvement	0 %
1	Poor	4 %
D/K	Don't Know	4 %
N/A	Did Not Answer	0 %



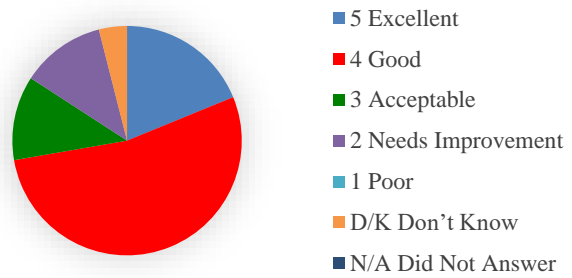
Brings well-thought-out recommendations for the Board's consideration.

5	Excellent	19 %
4	Good	46 %
3	Acceptable	23 %
2	Needs Improvement	8 %
1	Poor	0 %
D/K	Don't Know	4 %
N/A	Did Not Answer	0 %



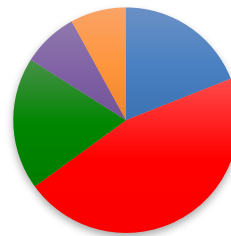
Actively builds the trust and support of the Board.

5	Excellent	19 %
4	Good	54 %
3	Acceptable	12 %
2	Needs Improvement	12 %
1	Poor	0 %
D/K	Don't Know	4 %
N/A	Did Not Answer	0 %



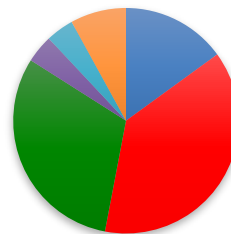
Encourages the Board to work together effectively.

5	Excellent	19 %
4	Good	46 %
3	Acceptable	19 %
2	Needs Improvement	8 %
1	Poor	0 %
D/K	Don't Know	8 %
N/A	Did Not Answer	0 %



Encourages innovative thinking on the part of the Board.

5	Excellent	15 %
4	Good	38 %
3	Acceptable	31 %
2	Needs Improvement	4 %
1	Poor	4 %
D/K	Don't Know	8 %
N/A	Did Not Answer	0 %



Comments:

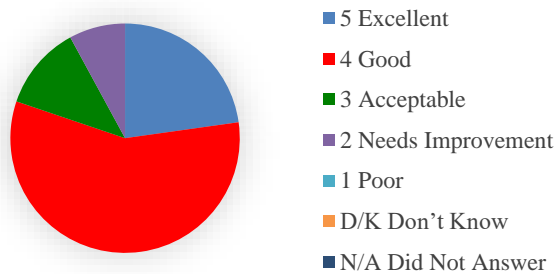
- ▶ Rick has lost some trust with the Board due to the lack of financial statements and accounting issues that have lingered far too long. When Rick makes recommendations to the Board, his recommendations do not always appear to be organized and concise for the Board to consider.
- ▶ Walking into the work environment that Rick did when he took the position was tough, and he has done a good job of encouraging the organization to work together, despite not everyone agreeing on one thing, the organization needs to unite to get things accomplished. There have been some good ideas that have come out under Rick's role as GM of the NREA, and if everything is followed through with it will be a step in the right direction.
- ▶ The Board seems very united and informed.

- ▶ Communicates with Board leadership very well. Does a good job keeping things moving at meetings. Provides good information.
- ▶ Recognizing Rick is splitting time between 2 organizations, he seems to operate a bit on the fly at NREA Board meeting and at times appears a bit unprepared.
- ▶ Rick has taken on some tasks that have previously been delayed or avoided by previous managers.
- ▶ Always lets the Board know what is going on and effectively communicates with all Board members.
- ▶ Ratings would be increased if financials and other topics were more clearly explained.
- ▶ Time will increase trust and support from the Board. Rick needs to continue to work on Board cohesion.
- ▶ Works well with the Board.

Government and Regulatory Relations

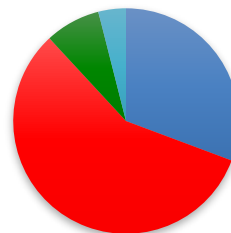
Represents the interests of the association’s membership before elected and appointed officials in an effective manner.

5	Excellent	23 %
4	Good	58 %
3	Acceptable	12 %
2	Needs Improvement	8 %
1	Poor	0 %
D/K	Don’t Know	0 %
N/A	Did Not Answer	0 %



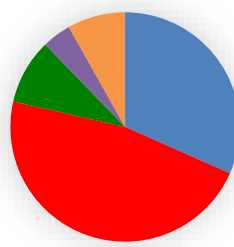
Understands the implications of new legislation and its impact on the association’s power districts and cooperatives.

5	Excellent	31 %
4	Good	58 %
3	Acceptable	8 %
2	Needs Improvement	0 %
1	Poor	4 %
D/K	Don’t Know	0 %
N/A	Did Not Answer	0 %



Maintains a reputation for integrity and honest dealings with the state legislature and other governmental bodies.

5	Excellent	31 %
4	Good	46 %
3	Acceptable	9 %
2	Needs Improvement	4 %
1	Poor	0 %
D/K	Don't Know	8 %
N/A	Did Not Answer	0 %



Comments:

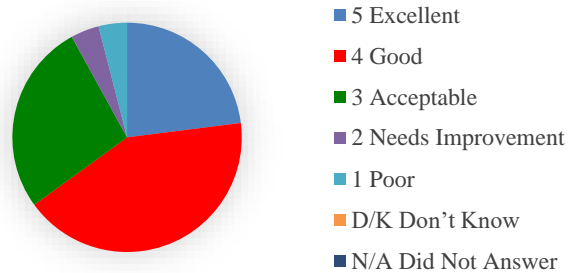
- ▶ Strong suit for Rick. Carryover from being a CRE President.
- ▶ Ratings are more reflective of him not having heard differently rather than having firsthand knowledge.
- ▶ Governmental relations is an area of strength for Rick. He understands the issues and how they impact the electric industry. He is actively involved with the state senators and congressional delegation.
- ▶ Under Rick's leadership, the NREA has taken steps in repairing relationships with our elected officials.
- ▶ Rick has done a great job with the legislative side of the business and keeping his finger on the pulse in Lincoln with the Senators. His relationships that he has with several of the elected officials definitely brings value to the organization.
- ▶ Rick has unity in our Lincoln office and created a team that works together.
- ▶ We haven't had opportunities to see how Rick is in action to make judgment on his reputation for integrity and honesty at the legislative/government bodies.
- ▶ We believe him to be a straight shooter. He stays abreast of legislative impacts as well as industry changes that may affect us.
- ▶ The handling of the ACRE resolution at the NRECA meeting was very frustrating and misleading to the membership.
- ▶ Rick is and has always been politically active and represents the rural electric utilities well.
- ▶ Been involved with state legislature and other governmental bodies.
- ▶ Feel he represents us well and in a positive manner with the legislature.
- ▶ This is a big strength of Rick's.

- ▶ We feel that NREA has lost a little ground with the Legislature. We see the attendance at our Legislative Event slipping. We need to make sure we are working on relationships with all Senators. We need to continue to work with the State Chamber.
- ▶ Seems to keep up well with proposed legislation and how it affects our industry.

Member Relations

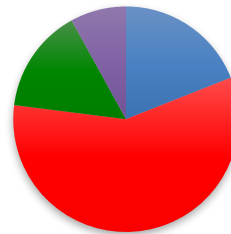
Sets the tone for the association as being responsive to its membership.

5	Excellent	23 %
4	Good	42 %
3	Acceptable	27 %
2	Needs Improvement	4 %
1	Poor	4 %
D/K	Don't Know	0 %
N/A	Did Not Answer	0 %



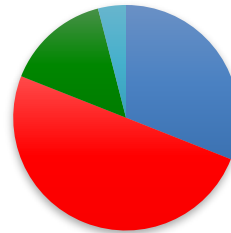
Stays in touch with member-system concerns and ensures that useful information and educational programs are developed and carried out.

5	Excellent	19 %
4	Good	58 %
3	Acceptable	15 %
2	Needs Improvement	8 %
1	Poor	0 %
D/K	Don't Know	0 %
N/A	Did Not Answer	0 %



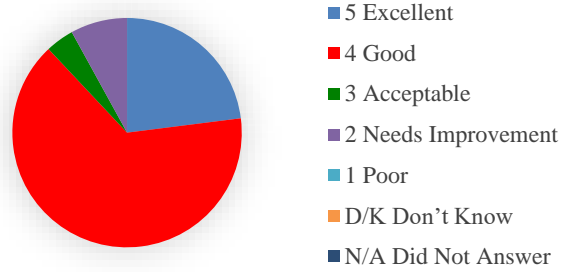
Maintains open communication with member-systems directors and managers.

5	Excellent	31 %
4	Good	50 %
3	Acceptable	15 %
2	Needs Improvement	0 %
1	Poor	4 %
D/K	Don't Know	0 %
N/A	Did Not Answer	0 %



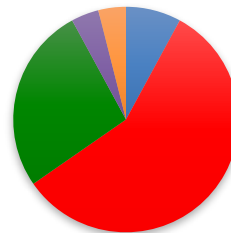
Demonstrates knowledge of current and emerging industry issues.

5	Excellent	23 %
4	Good	65 %
3	Acceptable	4 %
2	Needs Improvement	8 %
1	Poor	0 %
D/K	Don't Know	0 %
N/A	Did Not Answer	0 %



Identifies and implements specific strategies to assist member-systems deal with emerging issues in the industry.

5	Excellent	8 %
4	Good	58 %
3	Acceptable	27 %
2	Needs Improvement	4 %
1	Poor	0 %
D/K	Don't Know	4 %
N/A	Did Not Answer	0 %



Comments:

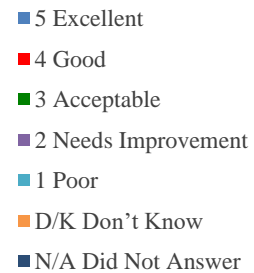
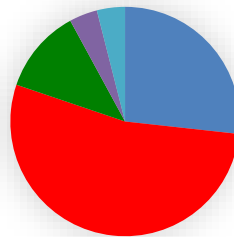
- ▶ Being a system manager he understands our concerns more than previous managers.
- ▶ It appears that Rick is engaged with the members and provides appropriate communication to them. He was graded lower on responsiveness due to the lack of financial statements and accounting issues. Rick seeks input from the membership, which is a good thing.
- ▶ Rick has always been willing to listen and share his experience.
- ▶ Rick has done a good job with trying to keep the membership united and pointed in one direction, despite their being a lot of different opinions on which direction it should be going. He has done a great job in the work that has been done with the college and JT&S program and making sure that it continuously improves year over year.
- ▶ Just very well informed and willing to share information with other Managers.
- ▶ Rick answers emails/texts/calls promptly. He is proactive in providing information that could impact Nebraska PPDs overall. He monitors our NREA Listserv and interjects appropriately. He identifies issues but it can be tricky to implement things given there is a very large and broad set of managers and directors.
- ▶ Have always felt that the membership works for the NREA association. Leadership and Staff needs to be responsive to questions and concerns of its members.
- ▶ Would like to see the grassroots visits continue. Otherwise, Rick does a good job communicating with the membership overall.

- ▶ Has a very good and maintained JT&S program that provides great value to the membership. Would like to hear more about the long range plans or ideas in other areas we could improve or deal with emerging topics and issues to improve value in those areas.
- ▶ Rick is very responsive and will answer regardless of where he is.
- ▶ We think NREA should have been involved with the discussions on the new IRA program. PPDs were left out of the IRA. This is something NREA should have been involved with at the beginning and provided that value to its members. NREA should have supported the membership when they changed the name of ACRE. This should have been communicated at the annual meeting in Nashville as planned.
- ▶ Emerging issues in the industry could be better but is hard to stay on top of if we are reacting instead of leading.
- ▶ Ricks vast industry knowledge and personality bring value to NREA.
- ▶ Implementing system visits and newsletter were great steps in keeping communication open.

Communication

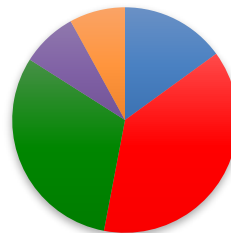
Provides well-written and timely Manager’s Reports.

5	Excellent	27 %
4	Good	54 %
3	Acceptable	12 %
2	Needs Improvement	4 %
1	Poor	4 %
D/K	Don’t Know	0 %
N/A	Did Not Answer	0 %



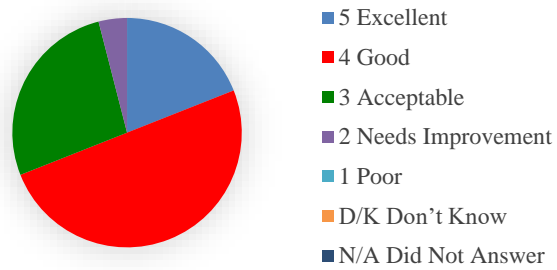
Provides timely information to the Board to ensure they are kept informed.

5	Excellent	15 %
4	Good	38 %
3	Acceptable	31 %
2	Needs Improvement	8 %
1	Poor	0 %
D/K	Don’t Know	8 %
N/A	Did Not Answer	0 %



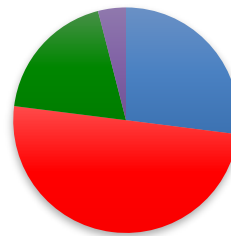
Communicates effectively with Board, public, and members.

5	Excellent	19 %
4	Good	50 %
3	Acceptable	27 %
2	Needs Improvement	4 %
1	Poor	0 %
D/K	Don't Know	0 %
N/A	Did Not Answer	0 %



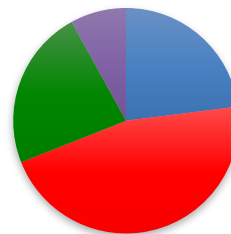
Listens well.

5	Excellent	27 %
4	Good	50 %
3	Acceptable	19 %
2	Needs Improvement	4 %
1	Poor	0 %
D/K	Don't Know	0 %
N/A	Did Not Answer	0 %



Expresses himself effectively orally and in writing.

5	Excellent	23 %
4	Good	46 %
3	Acceptable	23 %
2	Needs Improvement	8 %
1	Poor	0 %
D/K	Don't Know	0 %
N/A	Did Not Answer	0 %



Comments:

- ▶ Monthly manager's report is full of good information.
- ▶ Rick's monthly manager's report is informative. Rick communicates appropriately and timely to the parties that he associates with being the General Manager. It seems Rick could be better prepared for presentations at meetings. At times, he comes off as being unprepared when that may not necessarily be the case.
- ▶ Rick has been prompt on getting out his Managers Reports to the membership and the majority of the time it contains good information. I think that there is room for improvement on communication to the members when there are things happening internally that impact all systems, for example financial reports.
- ▶ Rick does a great job as I mentioned he lets other systems lead the discussion on topics. I feel if he just got up and stated his Custer opinion there would be push back from other

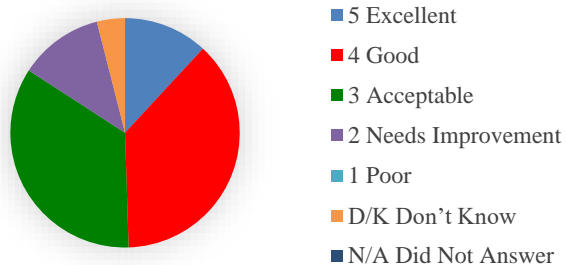
systems. He does a great job keeping systems united. Of course we would all like to be 100% unity but that never will happen and it makes us stronger having some debate on issues.

- ▶ Rick’s written communication is excellent. When speaking to the group, he could be more succinct and focused. He is respectful of people’s time.
- ▶ Very capable but at times seems unprepared. However, no one can work 2 full time jobs for too long without a few things falling through the cracks.
- ▶ Feel he could improve his enthusiasm and attitude towards leading the membership showing a more positive demeanor.
- ▶ Need to get the financial docs out ASAP.
- ▶ The issue with timely information ties to not having 2022 numbers.
- ▶ Some people don’t get Ricks sense of humor and he is sometimes hard to read, if you don’t really know him.
- ▶ Implementing system visits and newsletter were great steps in keeping communication open.

Financial

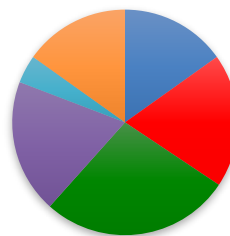
Meaningful budgets are developed in a timely manner.

5	Excellent	12 %
4	Good	38 %
3	Acceptable	35 %
2	Needs Improvement	12 %
1	Poor	0 %
D/K	Don’t Know	4 %
N/A	Did Not Answer	0 %



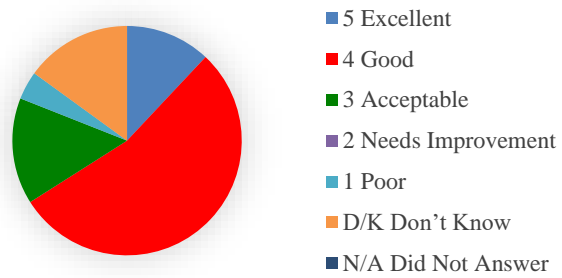
Expenses are accurately tracked and reported.

5	Excellent	15 %
4	Good	19 %
3	Acceptable	27 %
2	Needs Improvement	19 %
1	Poor	4 %
D/K	Don’t Know	15 %
N/A	Did Not Answer	0 %



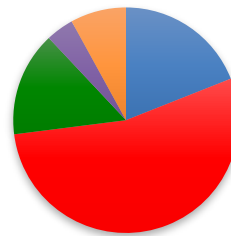
Cash reserves are prudently invested.

5	Excellent	12 %
4	Good	54 %
3	Acceptable	15 %
2	Needs Improvement	0 %
1	Poor	4 %
D/K	Don't Know	15 %
N/A	Did Not Answer	0 %



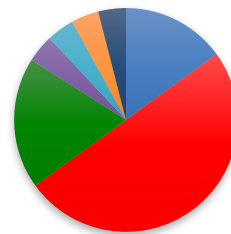
Actively evaluates cost effectiveness of statewide programs.

5	Excellent	19 %
4	Good	54 %
3	Acceptable	15 %
2	Needs Improvement	4 %
1	Poor	0 %
D/K	Don't Know	8 %
N/A	Did Not Answer	0 %



Adheres to budgetary guidelines.

5	Excellent	15 %
4	Good	50 %
3	Acceptable	19 %
2	Needs Improvement	4 %
1	Poor	4 %
D/K	Don't Know	4 %
N/A	Did Not Answer	4 %



Comments:

- ▶ Noting this area should improve as accounting department gets overhauled.
- ▶ Budgets have been timely prepared and well thought out when presented to the membership. Rick does care about the financial condition of the organization. Rick's willingness to return excess cash is a good plan. It is unclear if expenses are being appropriately tracked because of a lack of financial statements.
- ▶ Rick has provided a meaningful budget and is working through accounting challenges that once complete will benefit the organization.
- ▶ A few of these ratings were D/K due to the fact of issues that we are seeing with the financial results of 2022 and not being able to see the results. We know that they are transitioning to new software for financials and that there has been some turnover within the office on the accounting side that may of lead to some of the delays. There have been

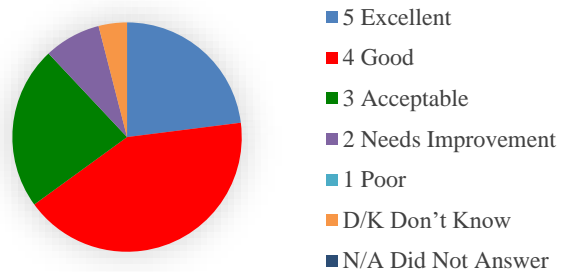
a few different discussions on accumulated margins and how they are going to be returned to the membership and it took some time, but i believe that they finally have the calculated values correct, but it took longer than we would have expected.

- ▶ The audit is a concern to other systems but I feel Rick will get to the bottom of old software issues and get it cleaned up. It will take some time; he has informed all managers of what has happened and it will be straightened out.
- ▶ Budgeting/Expenses - getting there, Rick is in the middle of rehauling some things and he will get where he needs to be. Grassroots - this is an area that has not yet been fully reviewed since Rick became manger. Not everything can be done all at once. Finance, Credit Union, Magazine, and JT&S have been the focus to date.
- ▶ Rick is very transparent with reporting of expenses. He is good at looking at each program or service provided to ensure it is adding value. He has faced budget issues related to losing an accountant and having to deal with problems during the annual audit. Billing of specific services was late in large part due to his insistence that the billings were accurate.
- ▶ The struggles exposed here could be more of a reflection of situations outside of Rick's control at this time.
- ▶ Realizing the software conversion on accounting has been a challenge but we need finances cleaned up and accurate. If we need to hire additional support to accomplish this, then we feel it is necessary. This timeline has been extended plenty long.
- ▶ This section is not applicable because we haven't seen the financials.
- ▶ The current reporting of the financials is unacceptable - period! The budget needs to be clear and concise. Seems like we discuss and finalize at the Board meeting and the group is too large to be working on the fly.
- ▶ Again, this has been a tough situation, but have heard some frustration due to the lack of written reports being presented to the membership.
- ▶ I believe needed changes to the budgeting and auditing process have been made or are being worked on. I think the changes will benefit NREA going forward.

Employee Relations

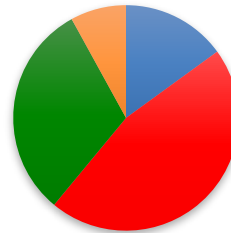
Assures that competent individuals are hired, trained and promoted.

5	Excellent	23 %
4	Good	42 %
3	Acceptable	23 %
2	Needs Improvement	8 %
1	Poor	0 %
D/K	Don't Know	4 %
N/A	Did Not Answer	0 %



Maintains an organizational culture that attracts, retains, motivates, and develops a highly engaged workforce.

5	Excellent	15 %
4	Good	46 %
3	Acceptable	31 %
2	Needs Improvement	0 %
1	Poor	0 %
D/K	Don't Know	8 %
N/A	Did Not Answer	0 %



Comments:

- ▶ Hard for us to know, but happy with the people we have in place.
- ▶ Attracting employees seems to be an issue based on recent hiring delays.
- ▶ It is difficult to comment on the culture because we are not present in the office. However, it does appear that employees have accepted Rick and they work well with him. It appears that Rick has been able to nurture the existing staff. It was a struggle to find a new accountant. The Lincoln market is competitive.
- ▶ Rick seems to have provided a positive organizational culture.
- ▶ This is a tough one to comment on as we are not in the office on a day to day basis and only see the employees at NREA functions. I have not noticed a significant change in the attitudes of the employees and I still witness some of the employees with some resentment to Rick being in the role that he is in.
- ▶ He has the NREA Team a team again. It's been a long time coming! Great work!
- ▶ Organizational culture is difficult to evaluate when only seeing employees at quarterly meetings or manager/legal meetings and aren't knowledgeable on day-to-day operations/culture.

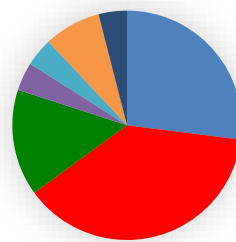
- ▶ Rick provides guidance to staff, as necessary. He coaches appropriately and lets them do their jobs. He is aware of goal setting and provides effective paths forward.
- ▶ This is hard to rate since no new hires have been made at NREA. Would like to see some movement to replace James' former position.
- ▶ NREA has a great staff and the culture seems good.
- ▶ We had a difficult time hiring an accountant. Not sure why that is?
- ▶ This issue ties to not replacing our accountant with an accountant. It is understood that the market for this position is very competitive. A full time manager may have been more responsive to this issue.
- ▶ The staff seem to be much happier - so from the 10,000 ft level, it seems like this area has improved.

Part Two

Appraisal of General Manager Goals

Goal #1: Successful complete the strategic plan, including development of the following:
Complete the strategic plan.

5	Excellent	27 %
4	Good	38 %
3	Acceptable	15 %
2	Needs Improvement	4 %
1	Poor	4 %
D/K	Don't Know	8 %
N/A	Did Not Answer	4 %



■	5 Excellent
■	4 Good
■	3 Acceptable
■	2 Needs Improvement
■	1 Poor
■	D/K Don't Know
■	N/A Did Not Answer

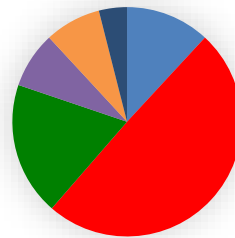
Comments:

- ▶ Good start with change in Board meeting structure.
- ▶ While the Board apparently made a choice for very slight modifications to the meetings, I think it was an opportunity missed to have more significant changes adopted. Without clearly describing how the business of the association could be done more effectively the Board was left to have concern and basically kept the meetings at the status quo.
- ▶ Rick is making a concerted effort to address the suggestions that were provided during the strategic planning process.
- ▶ Rick organized and assisted CFC with the Strategic Planning Session and has been a constant voice at the NREA meetings with the results of that Strategic Plan. He has done a good job with implementing some of the bullet points that came out of the Strategic Session.

- ▶ All we can ask for, dives into what he was given and straightens up the cards he was dealt from previous managers.
- ▶ Progress is being made to the defined plan.
- ▶ Rick has made it a priority to address the strategic plan at every meeting.
- ▶ I don't believe the Strategic Plan is completed.
- ▶ Had a successful strategic plan with positive topics to build off of, just need to make sure we revisit and accomplish the goals within.
- ▶ Done.
- ▶ We are not sure if we have completed the plan or not, but some work has been done.
- ▶ I have zero interest in setting goals for Rick or any other GM of the association. They should be able to understand their employees, industry issues, and provide us with their agenda/goals.
- ▶ Good process that got many ideas discussed.

Goal #2: Create and execute a strategy to successfully return funds to members.

5	Excellent	12 %
4	Good	50 %
3	Acceptable	19 %
2	Needs Improvement	8 %
1	Poor	0 %
D/K	Don't Know	8 %
N/A	Did Not Answer	4 %



- 5 Excellent
- 4 Good
- 3 Acceptable
- 2 Needs Improvement
- 1 Poor
- D/K Don't Know
- N/A Did Not Answer

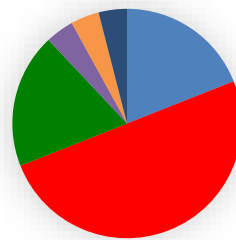
Comments:

- ▶ Work in progress.
- ▶ It seems to be on course but should have probably been completed by now.
- ▶ Rick developed a plan that was shared with the membership, which was later revised. A final plan for returning the funds has not been communicated.
- ▶ This is being worked on and will be complete once the accounting conversion and audit are finished.
- ▶ This is an item that has been talked about from Day 1 when Rick took the role and we continue to talk about it at meetings. I know that the returns have changed a few times due to accurately accounting for different systems that are/are not members at this time. I am hoping that the delay on the returns is due to the financials for 2022 not being completed and the new changes to the accounting system in the organization, and not something else.

- ▶ Rick has created several actions for this and let the districts choose how to handle this issue.
- ▶ This has been needed for quite some time. Rick used a qualified member’s assistance and with this member’s help has developed a methodology that deals with the assessment and implementation.
- ▶ Rick is currently working on this.
- ▶ As always, need to make sure we provide value to the membership.
- ▶ Done.
- ▶ Where is it?
- ▶ Still a work in progress but I believe we are heading in the right direction.

Goal #3: Continue system visits on a regular basis.

5	Excellent	19 %
4	Good	50 %
3	Acceptable	19 %
2	Needs Improvement	4 %
1	Poor	0 %
D/K	Don’t Know	4 %
N/A	Did Not Answer	4 %



- 5 Excellent
- 4 Good
- 3 Acceptable
- 2 Needs Improvement
- 1 Poor
- D/K Don’t Know
- N/A Did Not Answer

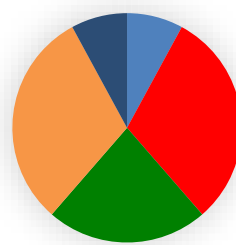
Comments:

- ▶ Rick is planning on getting around to all systems with a process of starting with the new managers.
- ▶ Haven’t heard reports that system visits have been continual since the first round of visits.
- ▶ Rick and the officers have visited most, if not all, of the systems. However, we have not received an update on systems being visited in 2023.
- ▶ In the first year Rick and the Executive Board made it to all systems. I would encourage him to visit a third or half of the systems each year.
- ▶ Rick did a good job attending system visits as well as bringing members of the Exec. team with him and was very open to questions within our Board Room.
- ▶ I would like to see more system visits, but with Rick’s workload visits once a year are most likely out of the question.
- ▶ The initial road trip occurred, not sure what a regular basis is going forward.
- ▶ Rick has made system visits a priority and we have only heard great comments about his endeavor.
- ▶ Rick has attended a Board meeting.

- ▶ No system visits over the last 12 months. Employees at our District need to hear directly from GM and/or staff from the statewide.
- ▶ We have been in contact to have the manager come visit at one of the upcoming Board Meetings.
- ▶ Was nice to have the visit with our Boards at our system. Seems like there is not adequate time to accomplish this each year.
- ▶ Ongoing.
- ▶ Haven't seen anybody yet.
- ▶ Rick has visited our office one time.
- ▶ Good to implement this.

Goal #4: Provide additional feedback and direction to employees.

5	Excellent	8 %
4	Good	31 %
3	Acceptable	23 %
2	Needs Improvement	0 %
1	Poor	0 %
D/K	Don't Know	31 %
N/A	Did Not Answer	8 %



- 5 Excellent
- 4 Good
- 3 Acceptable
- 2 Needs Improvement
- 1 Poor
- D/K Don't Know
- N/A Did Not Answer

Comments:

- ▶ This goal is difficult to rate but based on interactions at NREA meetings and improvements seen in employee responsibilities, it appears Rick is doing a nice job.
- ▶ Visit 1/3 of all member systems each year.
- ▶ Like mentioned earlier in the survey, this is a tough one to answer with much detail as we only see the employees at meetings and not on a day to day basis. We know that there is still some animosity amongst employees to Rick being placed in the role that he is today.
- ▶ We have a Team again!!
- ▶ Not familiar with day to day operations enough to make a judgement.
- ▶ We don't have direct information on this but feel he has engaged with the employees better than 2 of his predecessors.
- ▶ Unknown - we try not to interfere by talking to statewide employees about this.
- ▶ Not sure of the meaning of this question. It is the General Managers responsibility to take care of his employees.
- ▶ Have not heard anything to make us believe otherwise.

General Manager Goals for the Next Appraisal Period

What are your suggestions for goals between the Board and General Manager for the following year.

▶ **New Goal 1**

- ▶ Continue to look for a replacement as this is not a permanent job and time goes by quickly.
- ▶ Continuing transition for Rick to become full time statewide manager.
- ▶ For the GM to have a better grasp of all facets of the operation. An example of maybe not having complete knowledge was not remembering the last name of the part-time accountant. Didn't seem like was just escaping him at the moment but that he just wasn't familiar enough to know. Seems like a frequent statement is while looking at staff "help me out." While maybe not a terrible issue it often feels like a crutch because he may not be completely in tune with the topic.
- ▶ Timely and accurate financial statements.
- ▶ Continue to build relationships with our elected officials.
- ▶ Increased transparency regarding the financials of the organization and making sure that they are prepared in a manner that the organization can view them anytime. This is probably going to be a result of the new accounting software that is being implemented at this time.
- ▶ Continue the strategic plan goals to ensure association adapts to the changing needs of the members.
- ▶ Think about adding a grant writer to staff! We all could use one and let too many tax dollars out of rural communities in Nebraska that go elsewhere.
- ▶ Grassroots Program.
- ▶ Focus on membership systems that need additional engagement. Find ways to bring these systems into active attendance.
- ▶ Document Directives and Requests of Membership and track to completion.
- ▶ Replace James's former position.
- ▶ Timelier on audit.
- ▶ Consider not charging all members for the cost of the magazine, if they do not want the magazine. The proposal to incorporate the magazine production cost into all of the members' dues was not well received by our Directors.
- ▶ Provides options and ideas for new and upcoming technologies.
- ▶ Make sure that financials are reported often. A monthly look would be helpful.
- ▶ Have the financials figured out in a timely manner.

- ▶ Begin a search for permanent CEO to be completed summer of 2024.
- ▶ Need to have less tactical management and more leadership to move NREA to a position of leadership for the PPDs in Nebraska.
- ▶ Return excess margins.
- ▶ **New Goal 2**
- ▶ Continue the communication updates.
- ▶ Like the idea of having new speakers at Board meetings.
- ▶ Actively pursue having Southern Public Power District join the organization. This pursuit should be done professionally and in a very organized and well-prepared manner. Rick should consider including NREA member directors and/or managers that would be best at showing the benefits of membership to the Southern directors and general manager.
- ▶ A direct and clear message as to where the organization is going with the future General Manager. The two year window that was entered for Rick's tenure as NREA General Manager will be here before we know it, and the organization along with the Exec team have to be on the same page as to what happens at the end of that two year window. Whatever the decision is amongst the membership, whether Rick is the man going forward, or a search is performed for a new GM, it needs to be thought out and decisions made so that we don't come down to the end of the timeframe and still not know where we are going.
- ▶ Proactive action with Senators to increase education on value of locally controlled public power districts.
- ▶ Continue to make progress on clear and accurate financial data.
- ▶ Membership has expressed a concern about Rick's ability to handle 2 GM positions without experiencing burn-out. We would like to know how Rick plans to address this concern.
- ▶ Continue system visits whether it is from the GM or staff. Would like to continue Grassroots visits.
- ▶ Produce a set of financials.
- ▶ Is the proactive leader at the table with other organizations vs. reactive.
- ▶ Work with the Board on a transportation/vehicle plan and/or policy in preparation for future GM hires.
- ▶ Work on employing a Grassroots Coordinator.
- ▶ Provide financial information of the Statewide on a timely basis.
- ▶ Further develop relationships with other organizations in the state to ensure the stability of the rates in the state.

- ▶ Complete accounting transitions.
- ▶ **New Goal 3**
- ▶ Continue to strengthen the relationship with the legislature.
- ▶ Rick needs to ensure that he is mentoring the existing staff so they feel engaged and feel they are making a positive impact on the organization.
- ▶ Continued emphasis on the JT&S program and a good in depth study as to whether they have enough employees for all of the work that they are tasked with. The instructors are doing a great job, but it does appear that they may be stretched a little thin, and whether we need to look at adding staff or prioritizing the training delivered by the instructors, it needs to be a focus point.
- ▶ Provide knowledge or a glimpse of day-to-day culture and operations.
- ▶ Continue communication pieces such as newsletter, magazine, emails, social media, and system visits. Focus on the value of public power in all communications.
- ▶ More communication during Board meetings.
- ▶ Shows a positive attitude with enthusiasm to be at industry events.
- ▶ Work toward a full time manager for NREA.
- ▶ Have a stronger relationship with individuals in local, state and national politics to affect the needs of the PPDs in Nebraska.
- ▶ **New Goal 4**
- ▶ Rick should timely report and provide updates on strategic plan action items.
- ▶ Expand membership.
- ▶ Improve structure of meetings. Hold some teleconference meetings such as the Norfolk and Scottsbluff meeting.
- ▶ Reviews and accomplishes strategic objectives.
- ▶ Work to have the NREA Board to empower the Manager to make leadership decisions with ONLY the guidance of the Board and not individuals with loud agendas.
- ▶ **New Goal 5**
- ▶ Develop additional services for added value to the membership.

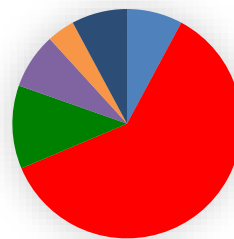
Other Comments:

- ▶ Rick is doing a nice job overall in leading the organization. He needs to ensure that the little things are done well and on a timely basis to avoid the membership thinking that he is being spread too thin by managing two organizations.

- ▶ Keep up the good work! I feel the organization in on the right track.
- ▶ Rick has done a good job in juggling two different positions, and we can only speak on what has been done for the NREA and not Custer. He is always accessible to the membership when they need to get ahold of him . Rick has shown that the years of working on relationships with folks in Lincoln and anyone else involved with the state government, has been time well spent for the membership. We are hoping that with the new accounting software and personnel, that the membership will be more informed on the financial status of the organization going forward, understanding that their will be a learning curve to overcome. With that being said, it is the belief of our system, that the organization needs to be run by a General Manager that is focused only on the NREA and not another position. A decision needs to be made by the membership as to what happens with that sooner rather than later, so that their is as little disruption to the business as possible.
- ▶ Thank you to Rick and the NREA Staff!
- ▶ Rick has done a great job of rebuilding the association’s reputation with the membership. Continue to build upon the good report with the membership.
- ▶ Overall, I am very pleased with Rick’s work and leadership.
- ▶ He does a good job leading the membership and has great intentions of making improvements where needed. We still feel like more time or a full time position would allow for improvements in areas or at functions. Seems like sometimes he is not properly prepared for the event, so more time allotted would hopefully allow for better preparation.
- ▶ NREA requires a full time Manager.
- ▶ For the Board and Membership to trust and support the GM. Get out of the way and let them lead. If at the end of the day, we don’t like where we are headed, then we have the wrong GM.
- ▶ Our Board thinks Rick is doing a good job.

Overall Rating

5	Excellent	8 %
4	Good	62 %
3	Acceptable	12 %
2	Needs Improvement	8 %
1	Poor	0 %
D/K	Don’t Know	4 %
N/A	Did Not Answer	8 %



- 5 Excellent
- 4 Good
- 3 Acceptable
- 2 Needs Improvement
- 1 Poor
- D/K Don't Know
- N/A Did Not Answer

This appraisal has been discussed with me.

General Manager

Date

On behalf of the NREA Board of Directors

Board President

Date