

**DR29 DATA PROCESSING SYSTEM ANALYST
Summative Appraisal Form**

Name _____ School Location _____

Position _____ Date of Review _____

Evaluator _____

Appraisal Period: From _____ to _____

Directions

The following statements describe the employee who achieves success. Based on cumulative performance information, the evaluator estimates the employee's effectiveness in meeting each criterion. Rate each criterion using the scale below that most closely describes the employee's attainment of that criterion. For each domain, a comment area is provided for general statements and/or recommendations.

Rating Scale

- 5 Clearly Outstanding:** Performance is consistently far superior to what is normally expected.
- 4 Exceeds Expectations:** Performance demonstrates increased proficiency and is consistently above expectations.
- 3 Meets Expectations:** Performance meets expectations and presents no significant problems.
- 2 Below Expectations:** Performance is consistently below expectations and significant problems exist.
- 1 Unsatisfactory:** Performance is consistently unacceptable.
- 0 Not Applicable**

JOB PERFORMANCE STATEMENTS

Fiscal Management

- ____1. Keeps the Budget Supervisor informed on the budget and data affairs of the district.
- ____2. Evaluates data procedures, systems, and controls in the central office departments and recommends improvements in their design, implementation, and maintenance.
- ____3. Maintains a continuous data auditing program for all funds and assists the district's independent and internal auditors in conducting the annual or periodic audit.
- ____4. Ensures that data systems comply with applicable laws and regulations including Texas Education Agency's Financial Accountability System Resource Guide
- ____5. Assists in the development of periodic data analysis to aid in determining the ability to accomplish district tasks.

- ____ 6. Prepares and enters all budget and data adjustments, additions, and deletions.
- ____ 7. Reviews and submits all job orders and print requests and maintains control of Barr print spool by verifying availability of data
- ____ 8. Assists in the preparation of the budget and development of long- and short-range objectives for the business operations of the district.
- ____ 9. Assists in the planning and conducts needs assessments for improvement of district budget and data operations.
- ____ 10. Administers the business office spooler and ensures that processes are cost effective and data is managed prudently.
- ____ 11. Provides leadership to achieve cost-effective practices throughout the district.
- ____ 12. Ensures that budget operations support the district's goals and objectives.

COMMENTS: _____

Policy, Reports, and Law

- ____ 13. Implements policies established by federal and state law, State Board of Education rule, and local board policy in area of business operations.
- ____ 14. Compiles, maintains, and files all physical and computerized reports, records, and other documents required.
- ____ 15. Prepares monthly and quarterly financial statements and related budget reports.
- ____ 16. Develops semi-annual financial information for submission of data to TEA.
- ____ 17. Prepares all changes in function budgets for board adoption.
- ____ 18. Prepares quarterly and final reports for all federal funds.

COMMENTS: _____

Purchasing and Inventory

- ____ 19. Assists with the data for fixed assets and compliance with the limits set by the Texas Education Agency's accounting manual, Financial Accountability Resource Guide.
- ____ 20. Assists in the maintenance and provision for depreciation.

COMMENTS: _____

Personnel Management

- ____21. Works well with all central office staff to expedite any and all print and data jobs submitted by departments.
- ____22. Develops training options and/or improvement plans to ensure exemplary budget and data operations.

COMMENTS: _____

Community Relations

- ____23. Demonstrates awareness of district and community needs and initiates activities to meet those needs.

COMMENTS: _____

Other

- ____24. Performs other duties as assigned by supervisor(s).
- ____25. Maintains confidentiality of information.

COMMENTS: _____

What strengths does _____ possess?

What are some improvements _____ can make to ensure a higher degree of success for students on this campus/department?

