

**DIRECTOR OF FINANCE
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. Prepares monthly financial statements as assigned by the Chief Financial Officer.
- ___2. Monitors Budgeting and Accounting functions as assigned by the CFO.
- ___3. Revises and updates the Budget Preparation and Procedures Manual as assigned by the CFO.
- ___4. Develops standards of operational, organizational and procedures handbook for other offices in the business department as assigned by the CFO.
- ___5. Trains staff and others in the financial procedures of the district as assigned by the CFO.

- ___6. Revises and updates the Student Activity Manual and trains district staff, as directed by the CFO.
- ___7. Reviews and analyzes Budget and Accounting Reports as directed by the CFO.
- ___8. Prepares Monthly Investment Reports for review by the CFO.
- ___9. Assists in the development of long- and short-range goals and objectives for the business operations of the district as assigned by the CFO.
- ___10. Monitors all reconciliations of the Accounting department as assigned by the CFO .
- ___11. Prepares Cash Flow Worksheet when assigned by the CFO.

COMMENTS:

Policy, Reports, and Law

- ___12. Monitors district policies to ensure compliance with federal and state law, State Board of Education rule, and local board policy in area of business operations and report to the CFO.
- ___13. Monitors records retention of the business and finance offices to ensure each office is appropriately complying and report to the CFO.
- ___14. Monitors federal funds compliance with TEA regulations and the FAR manual and report to CFO.

COMMENTS:

Purchasing and Inventory

- ___15. Is knowledgeable about the districts purchasing policies and ensures compliance with state and federal law and report to CFO.

COMMENTS:

District Insurance

Health and Related

- ___16. Is knowledgeable about the districts health insurance program and assists the CFO in the administration thereof.

Property and Casualty

- ___17. Is knowledgeable about the districts property and casualty programs and assists the CFO in the operational procedures.

COMMENTS:

Community Relations

- ___18. Works closely with other managers and directors to insure that all business and operational affairs of the District are maintained in an efficient manner as assigned by the CFO.
- ___19. Is an active participant in activities and organizations associated with school business affairs as directed by the CFO.
- ___20. Fosters good community relations and good relations among all school employees.

COMMENTS:

Other

- ___21. Performs other duties related to the finance and business affairs, as assigned by CFO.
- ___22. 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?

Summative Conference Comments:

Recommendation of Evaluator: I have read and received a copy of this evaluation. I have reviewed this instrument.

- ___ Renewal and/or Extension of Assignment
- ___ Non-renewal of Assignment
- ___ Termination of Assignment
- ___ Non-extension of Assignment

Administrator's Signature

Date

Employee's Signature

Date