

**DIRECTOR OF PURCHASING
Summative Appraisal Form**

Name _____ Location _____

Appraisal Period: From _____ to _____ Date of Review _____

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

- ___ 1. Administers bidding process and contracts for vendor performance/compliance within established limits (e.g. prepare specifications, evaluate bids, recommend vendors, conduct bid meetings, etc.) for the purpose of securing items and/or services within budget and in compliance with regulatory requirements.
- ___ 2. Analyzes and awards bids and/or proposals as authorized by the District purchasing policies and procedures and make recommendations for award to the School Board for their review and approval.
- ___ 3. Through evaluation of competitive proposals, assists District staff in selecting the vendor most appropriate to meet their needs. Ensure selection is fair and legally defensible. Monitor vendor and product performance to ensure they continually meet the highest standards, negotiating with vendors when appropriate and permitted by law.
- ___ 4. Processes purchasing related information (e.g. bid documents, tabulations, requisitions, product specifications, statement of work, performance terms, contracts, etc.) for the purpose of updating and distributing information, authorizing for action and/or complying with established practices.
- ___ 5. Approves purchase orders and monitor all purchase requisitions to determine correctness of information, calculations, etc. Maintains the Financial Management Purchasing PO Groups and approval levels, making necessary additions and/or changes upon request of the Chief Financial Officer.
- ___ 6. Researches contracts, suppliers, equipment, new products, in order to analyze information to determine product and/or service needs.

- ___ 7. Continually evaluates products and services offered by existing and prospective vendors. Counsels vendors as needed regarding District procurement policies and procedures, vendor performance requirements and product performance expectations.
- ___ 8. Administers training for school-based or District-level staff on purchasing procedures as they relate purchasing under our current Financial Management Data System, (e.g. data entry, availability of product or services, approved bid vendors, warehouse orders, fixed assets, etc.) or other training that may become necessary or prudent to enhance the district employee utilization of relevant screens within the finance software system.
- ___ 9. Serves as liaison with vendors for the purpose of monitoring and/or resolving all concerns/problems pertaining to orders placed/received by the district.
- ___ 10. Attends meetings (Board, committee, etc.) and prepares reports as requested.
- ___ 11. Develops and maintains the district purchasing department manual and webpage.

COMMENTS: _____

Warehouse and Fixed Assets

- ___ 12. Supervises and manages the daily operations of the warehousing and distribution system to provide a well-ordered and efficient receiving, storage and distribution system of supplies, materials and equipment.
- ___ 13. Administers the annual inventories of furniture, fixture, equipment and vehicles; the update of the inventory database to include results of inventories; communicate with the principal or department manager regarding matters relating to the paperwork to receive, move or dispose of property. Coordinates the implementation of property disposition procedures.
- ___ 14. Maintains accurate and current inventory records of the districts' fixed and movable assets. Oversees the effective implementation for the reconciliation of the inventory system for local maintenance and food service.

COMMENTS: _____

Supervisory Responsibilities

- ___ 15. Attends training sessions/conferences to enhance professional skills and knowledge.
- ___ 16. Demonstrates continuous effort to improve operations, decrease turnaround times, streamline work processes, and work cooperatively and jointly to provide quality seamless customer service.
- ___ 17. Evaluates job performance of employees to ensure effectiveness regarding their professional growth; work jointly with them to develop and accomplish improvement goals.
- ___ 18. Prepares and administers department budget. Monitors and authorizes expenditures in accordance with established guidelines.

COMMENTS: _____
