

**SECRETARY, CHIEF COMPLIANCE AND ACCOUNTABILITY OFFICER
Summative Appraisal Form**

Name _____

School 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

General Duties

- ____1. Maintains a positive and service-oriented public image for the district.
- ____2. Promotes good public relations through telephone courtesy.
- ____3. Develops forms and board memos as necessary for Chief Compliance and Accountability Officer.
- ____4. Maintains regular filing system for Chief Compliance and Accountability Officer.
- ____5. Manages the overall operation of the office of the Chief Compliance and Accountability Officer; coordinates the Chief Compliance and Accountability Officer's calendar by scheduling appointments and meetings, and receives visitors and telephone calls and monitors incoming correspondence.
- ____6. Orders and maintains office/workshop supplies as needed.
- ____7. Coordinates travel arrangements in compliance with district accounting policies and procedures.
- ____8. Prepares and/or reviews out-of-district travel requests and processes requests.
- ____9. Processes necessary paperwork for student trips.
- ____10. Ensures that personnel to receive stipends are properly advised of timesheet maintenance, payroll schedules, and other concerns regarding payroll process.
- ____11. Processes monthly pre-approved memos for overtime, and forwards compensation forms to payroll.
- ____12. Processes timesheets for proper payment to all temporary employees and forwards to proper department.

- ___13. Processes approved memos for continued employment of temporary personnel.
- ___14. Processes contracts and purchase requisitions for proper payment of all contractual consultant services, accepts receipts, and forwards to appropriate departments.
- ___15. Processes monthly local travel expense statements.
- ___16. Assists the Chief Compliance and Accountability Officer in the clerical preparation of all budgets and amendments.
- ___17. Originates all amendments to approved budgets and budget justifications as needed and processes according to district procedures.
- ___18. Processes purchase requisitions.
- ___19. Maintains a numerical file of all purchase orders for easy reference.
- ___20. Maintains a numerical file of all packing slips on orders received for easy reference.
- ___21. Processes purchase requisitions using instructional campus budget codes, mails to appropriate principal for signature; submits to purchasing once all necessary signatures have been obtained.
- ___22. Refers, as needed for accuracy, to the local budget manual to ensure that proper procedures are followed in making purchases, amendments, travel requests, etc.
- ___23. Prepares sign in sheets for various district meetings.
- ___24. Processes weekly time schedules for Chief Compliance and Accountability Officer and distributes to proper personnel.
- ___25. Organize snacks and drinks for various activities that fall under the facilitation of the Chief Compliance and Accountability Officer.
- ___26. Creates various forms as needed for use within the school district by administrators, teachers, departments, and school groups.
- ___27. Originates letters and memos to various individuals/groups.
- ___28. Works with all summer school programs to ensure the coordination of funding and timesheets to process for payroll.

COMMENTS: _____

Routine Secretarial Duties

- ___29. Places and receives telephone calls and records messages.
- ___30. Processes incoming correspondence as directed.
- ___31. Prepares forms as needed.
- ___32. Types letters, reports and memos.
- ___33. Collates materials for distribution to various campuses and/or other offices.

COMMENTS: _____

Other

____ 34. Performs all other tasks and duties as assigned by supervisor.

____ 35. Maintains confidentiality of information.

COMMENTS: _____

Supervisory Responsibilities

____ 36. Supervises student workers assigned to the office of the Chief Compliance and Accountability Officer.

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 (Print Name)

Date

Administrator (Signature)

Date

Employee's Signature

Date