

**CLERK, 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 | |

MAJOR RESPONSIBILITIES AND DUTIES

Purchasing

- ____1. Assists the Director of Purchasing in processing and submitting all purchase orders and paper work required for InterLocals, i.e., BuyBoard, TIPS, CPA Accounting of Texas, DIR, TXMAS, TCPN, U.W. Communities, etc.; utilizing the web to verify receipt of and corrections made by the InterLocals and/or the SFDRICISD; and maintaining documents on file.

- ____2. Assists the Director of Purchasing initiating contact with vendors to check on supply and equipment availability, invoices, purchase orders, and obtaining comparative prices and quotations.

- ____3. Reviews purchase requisitions/orders for completeness, accuracy, and conformance with procedures and regulations. Utilizes Batch POs and Reversals report to accurately mail out and disburse all purchase orders. Recognizes deficiencies in source documents and returns them to originator for correction.

- ____5. Maintains files for the HB914, Conflict of Interest Questionnaires obtained from each vendor and prepares an alpha listing.

- ____6. Responsible for the completion of Merchandise Return Forms. i.e., obtaining necessary information from ordering entity and vendor, etc.

- ____7. Maintains and keeps on file all district contracts and agreements provided to the Purchasing Department; all originals provided to Chief Financial Officer.

- ____8. Assists the Director of Purchasing in obtaining and reviewing certificates of insurance and other documents from each company actively participating in contracted services on SFDRCIDSD properties, i.e., Certificates of Liability Insurance and Worker’s Compensation Insurance, etc.
- ____9. Provides training to meet the needs of personnel within the district on purchasing and warehouse procedures and problem solving upon request pertaining to the web access on the finance software system.
- ____10. Apprises Director of Purchasing of budget standing in regards to departmental accounts. Helps with Correspondence, forms and reports using personal computer or typewriter when requested by the Director of Purchasing. Oversees the maintenance of equipment and supply inventory within department.
- ____11. Keeps informed of and comply with district, State and Federal purchasing policies and regulations through ongoing training, i.e., staff development training and/or assigned seminars.

COMMENTS: _____

Other

- ____12. Practices professional office etiquette, work in a cooperative spirit to serve the best interests of the district and to be courteous to students, staff and the public.
- ____13. Maintains confidentiality of information.
- ____14. Compile, maintain, and file all physical and computerized reports, records, and other documents.
- ____15. Perform all other tasks and duties as assigned.

COMMENTS: _____

What strengths does _____ possess?

What are some improvements _____ can make to ensure a higher degree of success?
