

**SECRETARY, CHIEF FINANCIAL OFFICER  
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. Uses designated computer software programs to perform tasks including writing letters and memos, maintaining a daily calendar and task list, and creating and maintaining spreadsheets and databases.
- \_\_\_ 2. Assist in binding materials for board agenda and attend all school board meetings.
- \_\_\_ 3. Prepares copies, files and distributes correspondence, data and reports.
- \_\_\_ 4. Receive, sort and distribute departmental mail.
- \_\_\_ 5. Greets Business Office visitors, answers telephones and schedules appointments.
- \_\_\_ 6. Prepare conference and travel arrangements as assigned.
- \_\_\_ 7. Prepares purchase orders, check requests and travel forms as directed and tracks goods or services ordered.
- \_\_\_ 8. Follows Business Office procedures and District policies and procedures.
- \_\_\_ 9. Assist with the School Board of Trustee election process, including attending the Secretary of State Election law seminar.
- \_\_\_ 10. Assist with the District Playoff and Instructional Field Trips budget.
- \_\_\_ 11. Submits and files TASB claim reports.

COMMENTS: \_\_\_\_\_  
\_\_\_\_\_

**Other**

\_\_\_ 12. Maintain confidentiality of information.

\_\_\_ 13. Compile, maintain, and file all physical and computerized reports, records, and other documents required.

\_\_\_ 14. Perform all other task and duties as assigned.

COMMENTS: \_\_\_\_\_  
\_\_\_\_\_

What strengths does \_\_\_\_\_ possess?

\_\_\_\_\_  
\_\_\_\_\_

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

\_\_\_\_\_  
\_\_\_\_\_

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's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Employee's Signature

\_\_\_\_\_  
Date