

COORDINATOR, SPECIAL REVENUE AND GRANTS

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

Major Responsibilities and Duties-Grant Funds

- ___ 1. Provides guidance and support to District in the fiscal operation of Special Revenue Grant funds.
- ___ 2. Maintains communication with District responsible for Special Revenue Grant funded programs.
- ___ 3. Reviews and monitors aspects of ESSER financial activity related to Special Revenue Grant funds to ensure compliance with federal/state guidelines and grant requirements.
- ___ 4. Assists with the determination and documentation of staff allocations based on Special Revenue Grant Funding program objectives.
- ___ 5. Assists in preparing federal/ state documentation within the timelines established by the TEA.
- ___ 6. Assists in the maintenance of funding to ensure comparability.
- ___ 7. Assists District personnel in the review and maintenance of data quality assurance.
- ___ 8. Assists in the maintenance of comprehensive files on Special Revenue Grant funded programs and services for audit purposes.

COMMENTS: _____

Major Responsibilities and Duties-Special Populations Funds

- ___ 9. Monitors and evaluates SHARS (School Health and Related Services) program to ensure compliance with regulations and guidelines.
- ___ 10. Submits bills and reimbursement documents to Medicaid on a regular basis for eligible special services provided by the district.
- ___ 11. Reconciles payments received from Medicaid on a regular basis for eligible special services provided by the district.
- ___ 12. Compiles information, prepares and submits reports as needed and required, including those responsibilities related to SHARS and Performance Based Monitoring.
- ___ 13. Maintains the participant list for the SHARS and MAC programs.
- ___ 14. Completes required training for RMTS, MAC, and SHARS.
- ___ 15. Coordinates with the Accounting Department to complete and submit the quarterly certification of funds.
- ___ 16. Acts as liaison between District and third-party administrator’s program staff.

COMMENTS: _____

Policies, Reports and Law

- ___ 17. Adheres to District policy and state guidelines in all areas of responsibility.
- ___ 18. Assists in developing and administering procedures and policies related External Funding.

COMMENTS: _____

Budget and Inventory

- ___ 19. Assists in the review and maintenance of district ESSER funding budgets.

COMMENTS: _____

Communications and Community Relations

- ___ 20. Develops a systematic process that responds to District inquiries.
- ___ 21. Communicates funding guidelines to District personnel and the general public.

COMMENTS: _____

Professional Growth and Development

- ___ 22. Serves on job-related and other committees assigned and approved by supervisors.
- ___ 23. Stays abreast with and ensures staff is informed of the latest research trends and developments in assigned areas of responsibility.

___24. Participates in professional development activities approved by supervisors.

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