

SECRETARY, DEPUTY SUPERINTENDENT OF BUSINESS SERVICES AND 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. Assists with coordinating Superintendent and Board of Trustees meetings. Serves as the recording secretary for regular and special meetings of the Board of Trustees, finalizes the minutes for adoption, and assists with maintaining the official board minute book. Prepares, posts, and distributes agenda with supporting materials.
- ____ 3. Prepares copies, files, and distributes correspondence, data, and reports.
- ____ 4. Receives, sorts, and distributes departmental mail.
- ____ 5. Greets Business Office visitors, answers telephones and schedules appointments.
- ____ 6. Coordinates travel arrangements for the Deputy Superintendent of Business Services and Chief Financial Officer, including conference registration, lodging, transportation, and itinerary preparation.
- ____ 7. Prepares purchase orders, check requests, and travel forms as directed and tracks goods or services ordered.
- ____ 8. Assists in developing and monitoring the Deputy Superintendent of Business Services and Chief Financial Officer's budget in compliance with District accounting policies and procedures.
- ____ 9. Follows Business Office procedures and District policies and procedures.
- ____ 10. Assists with the District Playoff and Instructional Field Trips budget.

- ____ 11. Submits and files liability insurance claim reports.
- ____ 12. Attends appropriate workshops/conferences for the purpose of ongoing training.

COMMENTS: _____

Other

- ____ 13. Maintains confidentiality of privileged and sensitive information.
- ____ 14. Compiles, maintains, and files all physical and computerized reports, records, and other documents required.
- ____ 15. Performs 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?

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