

**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

Fiscal Management

- _____ 1. Keep the superintendent informed on the business affairs of the district. Provides strategic leadership for the school district on finances, budget development, and investments. Directs the receipt, management of revenues and expenditures of the district's funds to insure proper and maximum returns on these funds. Forecasts short- and long-range cash requirements and obligations as a basis for sound financial planning.
- _____ 2. Ensures that accounting systems comply with applicable laws and regulations including Texas Education Agency Financial Accountability System and Resource Guide and any Federal Financial Accounting Manual. Evaluates accounting procedures, systems, and controls in all district departments and recommend improvements in their design, implementation, and maintenance.
- _____ 3. Maintains a continuous auditing program for all funds and collaborates with the district's independent and internal auditors in conducting the annual or periodic audit.
- _____ 4. Maintains the district investment portfolio. Develops cash flow analysis to aid in determining cash available for investment and payment of bills. Oversees preparation of monthly bank reconciliation for the operating, special revenue, debt service, construction, tax, cafeteria, and athletic accounts; review reconciliation of vendor and payroll clearing accounts.
- _____ 5. Reviews and approves all purchase orders and check requests and maintain control of budget by verifying availability of funds. Supervises the preparation of bids and bid specifications. Maintains accurate inventory records of the district's fixed and movable assets.
- _____ 6. Provides leadership to achieve cost-effective practices throughout the district. Works with district personnel to project student enrollments, staffing needs, employee benefit programs, building and facility needs, capital equipment needs, and other cost items for district and individual school improvement.

- _____ 7. Ensures that business operations support the district’s goals and objectives. Administers the business office budget and ensure that programs are cost effective and funds are managed prudently.
- _____ 8. Provides training for budget managers with their respective campus and department staff on financial systems, procedures, and controls.
- _____ 9. Oversee the development and recommendation of compensation plans. Ensures coordination and effective use of Position Management System as it relates to human resource, budgeting and payroll.
- _____ 10. Oversees data requested and received by TEA about public education, including student demographic and academic performance, personnel, financial, and organizational information.
- _____ 11. Monitor the Transportation department operations through the supervision of the Transportation Coordinator.
- _____ 12. Directs the administrative activities required for school-bond-issue elections.

COMMENTS: _____

Policy, Reports, and Law

- _____ 13. Implement policies established by federal and state law, State Board of Education rule, and local board policy in area of business operations.
- _____ 14. Direct personnel to compile, maintain, and file all physical and computerized reports, records, and other documents required.
- _____ 15. Prepare and evaluate monthly financial statements and related budget reports.
- _____ 16. Prepare and publish comprehensive annual financial report in compliance with TEA regulations as stated in FASRG. Develop semi-annual financial information for submission of data to TEA.
- _____ 17. Maintain a system for documentation of required reports and ensure deadlines are met with documentation on submission of reports.
- _____ 18. Ensure integrity and accuracy of all district, campus, and student data reported through PEIMS.
- _____ 19. Monitors Federal comparability requirements to ensure equitable allocation of state and local resources across schools, maintaining compliance with Title I and other federal regulations.
- _____ 20. Conducts annual comparability analyses using staffing and expenditure data for all Federal and state programs.
- _____ 21. Maintains documentation and reports supporting Federal comparability determinations for audits, monitoring visits, and compliance reviews.
- _____ 22. Compiles the annual SHARS Cost Report by collecting, reviewing, and analyzing financial, payroll, and service delivery data to ensure accuracy and compliance with Medicaid and state requirements.
- _____ 23. Coordinates SHARS cost reporting activities across departments, including Special Education, Finance, and Payroll, to support timely and accurate submission.
- _____ 24. Maintains supporting documentation for SHARS cost reports in accordance with federal and state record retention requirements.
- _____ 25. Act as liaison between District and Medicaid billing third party administrators.
- _____ 26. Coordinate the preparation and submission of standard applications to Texas Education Agency and other state or federal granting agencies for federal and state funds to include but not limited to ESSA Consolidated Grant, Student Success Initiative Grants (SSI), Focus and Priority Grants with respective departments.
- _____ 27. Inform superintendent and other administration of the effects of current and impending state and federal legislation that effect the level of grant funding.
- _____ 28. Advise the Board of Trustee of changes in funding for federal and state programs.

COMMENTS: _____

Administrative Responsibilities

____ 29. Provide updates and recommendations to keep the Superintendent informed on school finance matters.

COMMENTS: _____

Personnel Management

____ 30. Oversee the management of the district's Accounting and Purchasing Department, Budgeting Department, Payroll Department, Federal Programs Department and Transportation Department.

____ 31. Supervise and evaluate the performance of Comptroller, Purchasing Director, Budget Director, Federal Programs Coordinator, Transportation Coordinator, and Chief Financial Officer Secretary.

____ 32. Establish written processes and procedures relative to all aspects of finance and accounting to ensure effective execution of staff responsibilities for the various offices under the Chief Financial Officer. Define the duties of the personnel under the Chief Financial Officer's direction.

____ 33. Establish standards operational, organizational and procedures handbook for respective offices under the Chief Financial Officer. Develop training options and/or improvement plans to ensure exemplary business operations.

____ 34. Establish systems for verification to ensure accurate execution of job duties and responsibilities related to all areas for the division of business. Evaluate job performance of employees to ensure effectiveness.

____ 35. Ensure accountability in employee performance with appropriate and documented administrative action, as necessary.

____ 36. Recruit, train, and supervise personnel and make sound recommendations relative to personnel placement, assignment, retention, discipline, and dismissal.

____ 37. Promote a positive work environment that fosters high staff morale and excellence in the district.

____ 38. Serve as liaison between the Superintendent's Office and staff.

COMMENTS: _____

Community Relations

____ 39. Demonstrates awareness of district and community needs and initiates activities to meet those needs.

COMMENTS: _____

Other Related Duties

____ 40. Directs the administrative activities required for Board of Trustee elections.

____ 41. Maintains confidentiality of information.

____ 42. Performs 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