

**COMPTROLLER
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. Oversees the financial operation of the District to include providing leadership and expertise to ensure that the system of internal financial controls effectively and efficiently safeguard the assets of the District and provide accurate and timely financial information.
- ___ 2. Directs financial accounting, management, and reporting in accordance with Generally Accepted Accounting Principles (GAAP). Implement the policies established by federal and state law, State Board of Education rule, and local policy in the area of business; compile, maintain and file all reports, records and other required documents.
- ___ 3. Effectively leads, directs and manages operations including accounting, internal and external audit and controls, financial reporting, accounts payable, capital assets and maintain a system of controls over accounting transactions.
- ___ 4. Manages and monitors cash flow management, investment placement and daily banking management. Develop period cash flow analysis to aid in determining cash available for investment and payment of obligations. Produce worksheets of cash flow for district bank accounts. Ensure the effective implantation for reconciliation of all bank accounts maintained by the district.
- ___ 5. Oversees and maintains complete and systematic records of district's financial transactions. Records details of financial transactions and appropriate journals and general ledger.
- ___ 6. Monitors all billings from the accounting department to insure that all accounts are current.

- ___ 7. Oversees the effective implementation for the reconciliation of the monthly tax reports.
- ___ 8. Ensures the preparation of the monthly financial reports including the Combined Statement of Revenues, Expenditures and Fund Balances, Budget Status and Property Taxes and other reports as requested for administration and the Board of Trustees. Ensures actual activity does not exceed budget.
- ___ 9. Ensures the effective implementation for reconciliation of all bank accounts maintained by the district, including all investment accounts.
- ___ 10. Ensures the required debt payments are processed in a timely manner.
- ___ 11. Oversees the submission of all federal or grant fund reports including the MAC/SHARS programs and monitor indirect cost activity for federal funds.
- ___ 12. Attends meetings (Board, committee, etc.) and prepares reports as requested.
- ___ 13. Serves as liaison to student activity sponsors and booster organizations.
- ___ 14. Processes annual 1099 vendor activity.

COMMENTS: _____

Supervisory Responsibilities

- ___ 15. Attends training sessions/conferences to enhance professional skills and knowledge.
- ___ 16. Demonstrates continuous effort to improve operations, decrease turnaround times, streamline work processes, and work cooperatively and jointly to provide quality seamless customer service.
- ___ 17. Evaluates job performance of employees to ensure effectiveness regarding their professional growth; work jointly with them to develop and accomplish improvement goals.
- ___ 18. Prepares and administers department budget. Monitors and authorizes expenditures in accordance with established guidelines.

COMMENTS: _____

Other

- ___ 19. Maintains confidentiality of information.
- ___ 20. Performs all other task and duties as assigned.

COMMENTS: _____
