

HVAC MECHANIC I
Summative Appraisal Form

Name _____

School 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

Maintenance and Repair

- ____ 1. Diagnoses and repairs malfunctions in various types of heating, air conditioning and refrigeration systems, including rooftop equipment.
- ____ 2. Installs new heating and air conditioning systems and components.
- ____ 3. Relocates and expands existing HVAC systems as needed.
- ____ 4. Repairs, replaces, or calibrates controls, thermostats, switches, fuses, and electrical wiring.
- ____ 5. Fabricates, assembles, and installs duct work and piping according to specifications and code.
- ____ 6. Wires and connects motors, compressors, temperature controls, and humidity controls according to wiring schematics.
- ____ 7. Maintains refrigerant dispensing records to meet federal requirements.
- ____ 8. Maintains preventive maintenance schedules and procedures for all HVAC equipment, including changing of filters and cleaning condensers and coils.
- ____ 9. Performs duct cleaning and air quality testing as needed.

- ____ 10. Diagnoses and repairs various types of commercial kitchen equipment.
- ____ 11. Assists energy manager to complete energy conservation surveys to realize most efficient, cost-effective use of HVAC energy.
- ____ 12. Selects material and hardware and makes time and materials estimates.
- ____ 13. Maintains accurate records on material and labor used as required by Maintenance Department policies and procedures.
- ____ 14. Maintains inventory of district-owned tools, equipment, and materials.
- ____ 15. Inspects jobs upon completion and ensures areas are clean.
- ____ 16. Works with building principals and supervisors to complete projects.
- ____ 17. Detects needed repairs on equipment following established inspection procedures.
- ____ 18. Responds to emergency calls as needed.
- ____ 19. Receives and completes work orders as required by Maintenance Department policies and procedures.

COMMENTS: _____

Driving

- ____ 20. Operates light truck to transport furniture and equipment throughout district.

COMMENTS: _____

Safety

- ____ 21. Instructs assigned personnel on proper and safe use of tools and equipment.
- ____ 22. Operates tools, equipment, and machinery according to prescribed safety procedures.
- ____ 23. Follows established safety procedures and techniques to perform job duties, including lifting, climbing, etc.
- ____ 24. Ensures that vehicles, equipment, and tools are in safe operating condition.
- ____ 25. Inspects and adjusts tools and equipment for safety and efficiency.
- ____ 26. Corrects unsafe conditions in work area and reports any conditions that are not correctable to supervisor immediately.

COMMENTS: _____

Other

- ____ 27. Follows and abides by School Board and Maintenance Department policies and procedures.

