

**SECRETARY, CHIEF COMPLIANCE/ACCOUNTABILITY OFFICER AND CHIEF ADMINISTRATIVE OFFICER
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 STANDARDS

General Duties

- _____ 1. Maintains a positive and service-oriented public image for the district.
- _____ 2. Promotes good public relations through telephone courtesy.
- _____ 3. Develops forms and board memos as necessary for Chief Compliance and Accountability Officer and Chief Administrative Officer.
- _____ 4. Maintains regular filing system for Chief Compliance and Accountability Officer and Chief Administrative Officer.
- _____ 5. Manages the overall operation of the office of the Chief Compliance and Accountability Officer and Chief Administrative Officer
- _____ 6. Coordinates the Chief Compliance and Accountability Officer and Chief Administrative Officer's calendar by scheduling appointments and meetings, receiving visitors and telephone calls, and monitoring incoming correspondence.
- _____ 7. Orders and maintains office/workshop supplies as needed.
- _____ 8. Coordinates travel arrangements in compliance with district accounting policies and procedures.
- _____ 9. Prepares and/or reviews out-of-district travel requests and processes requests.

- _____ 10. Processes necessary paperwork for student trips.
- _____ 11. Ensures that personnel who receive stipends are properly advised of timesheet maintenance, payroll schedules, and other concerns regarding the payroll process.
- _____ 12. Processes monthly pre-approved memos for overtime and forwards compensation forms to payroll.
- _____ 13. Processes timesheets for proper payment to all temporary employees and forwards them to the proper department.
- _____ 14. Processes approved memos for continued employment of temporary personnel.
- _____ 15. Processes contracts and purchase requisitions for proper payment of all contractual consultant services, accepts receipts, and forwards them to appropriate departments.
- _____ 16. Processes monthly local travel expense statements.
- _____ 17. Assists the Chief Compliance and Accountability Officer and Chief Administrative Officer in the clerical preparation of all budgets and amendments.
- _____ 18. Originates all amendments to approved budgets and budget justifications as needed and processes them according to district procedures.
- _____ 19. Processes purchase requisitions.
- _____ 20. Maintains a numerical file of all purchase orders for easy reference.
- _____ 21. Maintains a numerical file of all packing slips on orders received for easy reference.
- _____ 22. Processes purchase requisitions using instructional campus budget codes, mails to the appropriate principal for signature; submits to purchasing once all necessary signatures have been obtained.
- _____ 23. Refers, as needed for accuracy, to the local budget manual to ensure that proper procedures are followed in making purchases, amendments, travel requests, etc.
- _____ 24. Prepares sign-in sheets for various district meetings.
- _____ 25. Processes weekly time schedules for the Chief Compliance and Accountability Officer and the Chief Administrative Officer and distributes them to the proper personnel.
- _____ 26. Organizes snacks and drinks for various activities that fall under the facilitation of the Chief Compliance and Accountability Officer or Chief Administrative Officer.
- _____ 27. Creates various forms as needed for use within the school district by administrators, teachers, departments, and school groups.
- _____ 28. Originates letters and memos to various individuals/groups.

COMMENTS: _____

Routine Secretarial Duties

- _____ 29. Places and receives telephone calls and records messages.
- _____ 30. Processes incoming correspondence as directed.
- _____ 31. Prepares forms as needed.
- _____ 32. Types letters, reports, and memos.
- _____ 33. Collates materials for distribution to various campuses and/or other offices.

COMMENTS: _____

Other

- _____ 34. Performs all other tasks and duties as assigned by supervisor.
- _____ 35. Maintains confidentiality of information.

COMMENTS: _____

What strengths does _____ possess?

What are some improvements _____ can make to ensure a higher degree of success for this department?

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