

DIRECTOR, BUDGET
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

General Funds

- ___ 1. Prepares the District's annual budget by compiling budget projections for immediate and long-range resources and appropriations and ensure PEIMS submission of budget data. Ensure that budget operations support the District's goals and policy.
- ___ 2. Oversees budget compliance to applicable laws and regulations including Texas Education Agency's Financial Accountability System Resource Guide and allowable expenditures under federal and/or state guidelines.
- ___ 3. Prepares and balances monthly financial budget statements for administration and the Board of Trustees.
- ___ 4. Monitors and analyzes District and campus/department budgets by comparing budgeted amounts with actual activity to approve budget transfers. Review and process cash receipt summaries.
- ___ 5. Analyzes financial trends to ensure proper fiscal management practices and ensure budget expenditures do not exceed functional categories.
- ___ 6. Trains District staff and site managers in budget preparation, implementation and control by conducting training sessions and one-on-one site assistance.
- ___ 7. Maintains the Budget department webpage, budget manual and the District department/campus budget files.
- ___ 8. Recommends and implements data processing programs and modifications for the budget process.

Special Revenue Funds

- ___ 9. Provide guidance and support to District in the fiscal operation of Special Revenue Grant Funds.
- ___ 10. Assist with the determination and documentation of staff allocations based on Special Revenue Grant Funding program objectives.
- ___ 11. Monitor grant-funded programs and their expenditures to ensure compliance with regulations and guidelines.
- ___ 12. Advise campus administrators of projected allocation amounts during the district budget process.
- ___ 13. Ensure that programs are cost effective and that federal and state programs are managed wisely.
- ___ 14. Compile budget and cost estimates based on documented program needs.

Payroll

- ___ 15. Directs the processing, printing of check-stubs, and preparation of the ACH File for Payroll; and process and print checks for Accounts Payable.
- ___ 16. Processes internal departmental billings for reimbursement.
- ___ 17. Oversees the submission of all Payroll reports.

COMMENTS: _____

Supervisory Responsibilities

- ___ 18. Implements the policies established by federal and state law, and local board policies.
- ___ 19. Attends training sessions/conferences to enhance professional skills and knowledge.
- ___ 20. Demonstrates continuous effort to improve operations, decrease turnaround times, streamline work processes, and work cooperatively and jointly to provide quality seamless customer service.
- ___ 21. Evaluates job performance of employees to ensure effectiveness regarding their professional growth; work jointly with them to develop and accomplish improvement goals.
- ___ 22. Prepares and administers department budget. Monitors and authorizes expenditures in accordance with established guidelines.
- ___ 23. Supervises and evaluates the performance of Payroll Supervisor, Budget and Payroll Clerks, and Budget Clerk Assistant.

COMMENTS: _____

Other

- ___ 24. Maintains confidentiality of information.
- ___ 25. 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's (Print Name)

Date

Administrator's (Signature)

Date

Employee's Signature

Date