

**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**

- |          |                              |  |
|----------|------------------------------|--|
| <b>5</b> | <b>Clearly Outstanding:</b>  | Performance is consistently far superior to what is normally expected.                 |
| <b>4</b> | <b>Exceeds Expectations:</b> | Performance demonstrates increased proficiency and is consistently above expectations. |
| <b>3</b> | <b>Meets Expectations:</b>   | Performance meets expectations and presents no significant problems.                   |
| <b>2</b> | <b>Below Expectations:</b>   | Performance is consistently below expectations and significant problems exist.         |
| <b>1</b> | <b>Unsatisfactory:</b>       | Performance is consistently unacceptable.  |
| <b>0</b> | <b>Not Applicable</b>        |  |

**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.

\_\_\_\_ 28. Performs other duties as assigned by supervisor.

\_\_\_\_ 29. Maintains confidentiality of information.

**COMMENTS:** \_\_\_\_\_

\_\_\_\_\_

What strengths does \_\_\_\_\_ possess?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

What are some improvements \_\_\_\_\_ can make to ensure a higher degree of success for students on this campus/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 (Signature)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Employee's Signature

\_\_\_\_\_  
Date