

**WAKULLA COUNTY SCHOOL BOARD
 COMPREHENSIVE ASSESSMENT FORM SUMMARY
 SUPPORT PERSONNEL**

Name _____

Position

FINANCE ASSISTANT

School / Dept _____

School Year _____

EIN # _____

JOB CONTEXT SERVICE CATEGORY	Needs				
	<u>Outstanding</u>	<u>Exemplary</u>	<u>Effective</u>	<u>Improvement</u>	<u>Unsatisfactory</u>
1. SERVICE DELIVERY	<input type="checkbox"/> 30	<input type="checkbox"/> 28	<input type="checkbox"/> 26	<input type="checkbox"/> 18	<input type="checkbox"/> 0
2. INTER/INTRA – AGENCY COMMUNICATION AND DELIVERY	<input type="checkbox"/> 16	<input type="checkbox"/> 14	<input type="checkbox"/> 12	<input type="checkbox"/> 6	<input type="checkbox"/> 0
3. EMPLOYEE QUALITIES/RESPONSIBILITIES	<input type="checkbox"/> 18	<input type="checkbox"/> 16	<input type="checkbox"/> 14	<input type="checkbox"/> 7	<input type="checkbox"/> 0
4. SYSTEM SUPPORT	<input type="checkbox"/> 18	<input type="checkbox"/> 16	<input type="checkbox"/> 14	<input type="checkbox"/> 7	<input type="checkbox"/> 0
5. WORKSITE SERVICE STANDARDS	<input type="checkbox"/> 18	<input type="checkbox"/> 16	<input type="checkbox"/> 14	<input type="checkbox"/> 7	<input type="checkbox"/> 0
Totals:	<input style="width: 50px; height: 20px;" type="text"/>	<input style="width: 50px; height: 20px;" type="text"/>	<input style="width: 50px; height: 20px;" type="text"/>	<input style="width: 50px; height: 20px;" type="text"/>	<input style="width: 50px; height: 20px;" type="text"/>

Overall Rating

Information from the comprehensive feedback summary was collected and analyzed in the preparation of this report.

Outstanding _____
 Exemplary _____
 Effective _____
 Needs Improvement _____
 Unsatisfactory _____
100 - 94 93 - 86 85 - 75 74 - 65 64 - 0

Comments of the Evaluatee:

This evaluation has been discussed with me: Yes _____ No _____

Signature of Evaluatee Date

Comments of the Evaluator:

Signature of Evaluator Date

**WAKULLA COUNTY SCHOOL BOARD ANNUAL
PERFORMANCE APPRAISAL
FINANCE ASSISTANT**

Name _____ Position _____

School / Dept. _____ School Year _____

1. SERVICE DELIVERY

Category Definitions

1. Assist in the functions of financial accounting program cost reporting, accounts payable financial reporting, payroll, cash receipts and cash flow.
2. Develop awareness and assist with the District investment program(s).
3. Assist in the delivery of the employee benefits program.
4. Assist in the maintaining and preparation of information regarding the financial status of the school system.
5. Assist in preparation of financial reports as requested for District financial planning, negotiating, and/or reporting.
6. Prepare and submit required federal and state financial reports.
7. Assist in the preparation and financial tracking of grants and designated funds providing administrator with status reports.
8. Oversee the routine maintenance of the District's property inventory, which includes an annual verification.
9. Execute the monthly accounting processes for the District's finance system updating the data routinely.
10. Oversee the accounts payable purchase order processes including maintenance of vendor lists, invoices, and receiving reports.
11. Oversee the execution of the automated finance system with specialization in the area of printing checks, registers and reports for the accounts payable processes.
12. Assist with the financial accounting for construction projects submitting PECO and other disbursement requests.
13. Supervise maintenance of financial reports and records for audit and historical purposes.
14. Cooperate and facilitate the resolution of financial problems.
15. Prepare special finance reports on request
16. Facilitate resolutions to finance problems.

Source Code A. Direct B. Indirect C. Training Programs D. Evaluatee E. Confirmed
(Check Choices) Documentation Documentation Competency Acquisition Provided Observation

Rating Code Outstanding Exemplary Effective Needs Improvement Unsatisfactory
(Check Choice) 30 28 26 18 0

2. INTER / INTRA-AGENCY COMMUNICATION AND DELIVERY

Category Definitions

17. Provide for positive communication among staff.
18. Serve as a resource to schools and departments in areas of responsibility.
19. Serve as a liaison with other agencies as required.
20. Perform routine duties as required; i.e., serve as receptionist, compose and send correspondence, answer telephone, sort and distribute mail and order materials.

Source Code A. Direct B. Indirect C. Training Programs D. Evaluatee E. Confirmed
(Check Choices) Documentation Documentation Competency Acquisition Provided Observation

Rating Code Outstanding Exemplary Effective Needs Improvement Unsatisfactory
(Check Choice) 16 14 12 6 0

3. EMPLOYEE QUALITIES/RESPONSIBILITIES

Category Definitions

21. Maintain confidentiality regarding all matters related to assignments.
22. Participate in workshops and training sessions as required.
23. Maintain work area in a safe and secure manner.
24. Model and maintain high ethical standards.
25. Follow attendance and proper dress rules as required.

Source Code A. Direct B. Indirect C. Training Programs D. Evaluatee E. Confirmed
(Check Choices) Documentation Documentation Competency Acquisition Provided Observation

Rating Code Outstanding Exemplary Effective Needs Improvement Unsatisfactory
(Check Choice) 18 16 14 7 0

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4. SYSTEM SUPPORT

Category Definitions

- 26. Ensure that School Board policies and governmental regulations are consistently applied to assignments.
- 27. Assist and/or direct the investigation of errors and complaints.
- 28. Assist in training other personnel providing back-up assistance as necessary.
- 29. Assist the Director with required reports.
- 30. Perform other incidental tasks consistent with the goals and objectives of the District and this position.

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(Check Choices) Documentation Documentation Competency Acquisition Provided Observation

Rating Code Outstanding Exemplary Effective Needs Improvement Unsatisfactory
(Check Choice) 18 16 14 7 0

5. WORKSITE SERVICE STANDARDS

Control Dimension

Student growth and achievement, the work ethic, fostering and developing professional image, collaboration and affirmative networking, systemic and systematic preparation for function delivery, interpersonal interaction, teamsmanship and communication skills, translating organizational purpose into observable behavior and others.

Special Note: An outstanding or exemplary is required in this job context category in order to be eligible for an overall exemplary or higher rating

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(Check Choices) Documentation Documentation Competency Acquisition Provided Observation

Rating Code Outstanding Exemplary Effective Needs Improvement Unsatisfactory
(Check Choice) 18 16 14 7 0