

**WAKULLA COUNTY SCHOOL BOARD
 COMPREHENSIVE ASSESSMENT SUMMARY FORM
 DISTRICT BASED ADMINISTRATOR**

Name _____ Position CHIEF FINANCIAL OFFICER

School / Dept _____ School Year _____ EIN # _____

JOB CONTEXT SERVICE CATEGORY	Needs				
	Outstanding	Exemplary	Effective	Improvement	Unsatisfactory
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 & DELIVERY	<input type="checkbox"/> 16	<input type="checkbox"/> 14	<input type="checkbox"/> 12	<input type="checkbox"/> 6	<input type="checkbox"/> 0
3. PROFESSIONAL GROWTH & IMPROVEMENT	<input type="checkbox"/> 16	<input type="checkbox"/> 14	<input type="checkbox"/> 12	<input type="checkbox"/> 6	<input type="checkbox"/> 0
4. SYSTEMIC FUNCTIONS	<input type="checkbox"/> 20	<input type="checkbox"/> 18	<input type="checkbox"/> 16	<input type="checkbox"/> 8	<input type="checkbox"/> 0
5. LEADERSHIP & STRATEGIC ORIENTATION	<input type="checkbox"/> 18	<input type="checkbox"/> 16	<input type="checkbox"/> 14	<input type="checkbox"/> 7	<input type="checkbox"/> 0
Totals:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
6. WORKSITE SERVICE STANDARDS	<input type="checkbox"/> OST	<input type="checkbox"/> EX	<input type="checkbox"/> EFF	<input type="checkbox"/> NI	<input type="checkbox"/> Un
7. ASSESSMENT AND OTHER SERVICES	<input type="checkbox"/> OST	<input type="checkbox"/> EX	<input type="checkbox"/> EFF	<input type="checkbox"/> NI	<input type="checkbox"/> Un

NOTE:

An exemplary or higher rating is required in Job Context Service Categories 6 and 7 in order to receive an overall exemplary or higher rating.

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 _____

Comments of the Evaluator:

 Signature of Evaluatee Date

 Signature of Evaluator Date

**WAKULLA COUNTY SCHOOL BOARD ANNUAL
PERFORMANCE APPRAISAL
CHIEF FINANCIAL OFFICER**

Name _____

School / Dept. _____ School Year _____

1. SERVICE DELIVERY

Category Definitions

1. Coordinate and perform the functions of financial accounting, program cost reporting, accounts payable, financial reporting, payroll, cash receipts and cash flow.
2. Administer the District's investment program.
3. Administer functions of the employee benefits program.
4. Facilitates provision of information regarding the financial status of the school system.
5. Prepare financial reports upon the request of the Assistant Superintendent for Administration and/or Superintendent.
6. Prepare financial reports as required by state and federal agencies having jurisdiction over public school funds.
7. Assist in the preparation of data for the collective bargaining process.
8. Assist in the preparation of grant applications.
9. Serve as the District contact person for retirement matters.
10. Prepare the fiscal year-end property records report.
11. Assist in submission of State staff Automated surveys.
12. Administer district purchasing, including RFP's, bids, and contracts as necessary, with responsibility for managing and coordinating purchasing through the District, assuring maximum value educationally and financially in securing supplies, materials, equipment and services.
13. Plan for and control the cash flow in order to ensure that adequate funds are available for daily operations and to receive maximum returns on investments.
14. Prepare the Superintendent's Annual Financial Reports.
15. Develop, recommend and administer the department budget.

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

16. Provide technical assistance in preparing and maintaining budgets.
17. Facilitate effective community relations and interpret financial matters to the community.
18. Provide coordination of activities between units in the Finance Department
19. Advise and assist District staff members on budget, accounting policies and interpret / apply policies to the various financial functions.

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

Name _____

3. PROFESSIONAL GROWTH AND IMPROVEMENT

Category Definitions

- 20. Provide technical assistance to assigned employees as needed.
- 21. Assist in providing for cross-training of personnel within the department.
- 22. Set high standards for self and others.
- 23. Promote and support the professional growth of self and others.

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

4. SYSTEMIC FUNCTIONS

Category Definitions

- 24. Keep abreast of legal requirements and proposed changes in areas of responsibility and advise the Assistant Superintendent for Administration regarding impact on the District.
- 25. Post and balance bond registries as payments are made and coupons are received.
- 26. Supervise assigned personnel, conduct annual performance appraisals and make recommendations for appropriate employment action.
- 27. 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) 20 18 16 8 0

5. LEADERSHIP AND STRATEGIC ORIENTATION

Category Definitions

- 28. Recommend, initiate and review new and improved methods, policies and procedures for budget preparation, administration and analysis.
- 29. Assist in the preparation of the annual District budget.
- 30. Assist in the preparation of financial reports and statements to the schools, the District, the state and federal government.

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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

Name _____

6. WORKSITE SERVICE STANDARDS

Control Dimension

Student growth an 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)

7. ASSESSMENT AND OTHER SERVICES

Control Dimension

The use of the adopted appraisal systems for instructional and other employees.
The accurate and timely filing of all school reports.
The completion of required professional development services.

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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Rating Code Outstanding Exemplary Effective Needs Improvement Unsatisfactory
(Check Choice)