

**SCHOOL DISTRICT OF GADSDEN COUNTY**

**ASSISTANT SUPERINTENDENT FOR BUSINESS AND FINANCE**

PERFORMANCE APPRAISAL

Name \_\_\_\_\_ Position \_\_\_\_\_

School / Dept. \_\_\_\_\_ School Year \_\_\_\_\_

**1. SERVICE DELIVERY**

**Category Definitions**

1. Coordinate and manage the financial planning for the District.
2. Coordinate and direct the budget control function.
3. Oversee purchasing, including RFPs or bids as necessary for the District.
4. Direct the District's cash management program.
5. Respond to individual auditor concerns and questions during audit period and coordinate the District's formal response to audits.
6. Supervise the preparation of financial reports.
7. Assign and supervise work within the accounting office.
8. Coordinate budget, accounting, billing and collection control procedures.
9. Record cash receipts, deposit all funds, and assist in the District's investment program.
10. Provide funding advice for Capital Improvement and Debt Service Programs.
11. Oversee all functions necessary for maintaining the District's payroll system.
12. Prepare the Superintendent's Annual Financial Report.
13. Coordinate the District's investment program of surplus funds.
14. Prepare and submit monthly financial statements to the Superintendent and School Board members.
15. Coordinate the District's risk management program.
16. Determine need and procure surety bonds.

**Source Code** (circle choices)

- |                               |                         |                           |   |                       |                          |
|-------------------------------|-------------------------|---------------------------|---|-----------------------|--------------------------|
| A. Behavioral Event Interview | B. Direct Documentation | C. Indirect Documentation | D. Training Programs Competency Acquisition | E. Evaluatee Provided | F. Confirmed Observation |
|-------------------------------|-------------------------|---------------------------|---|-----------------------|--------------------------|

**Rating Code** (circle one)

- |                |                   |           |                |             |
|----------------|-------------------|-----------|----------------|-------------|
| Unsatisfactory | Needs Improvement | Effective | Very Effective | Outstanding |
|----------------|-------------------|-----------|----------------|-------------|

**ASSISTANT SUPERINTENDENT FOR BUSINESS AND FINANCE (Continued)**

**2. INTERAGENCY COMMUNICATION AND DELIVERY**

**Category Definitions**

- 17. Assist with the planning and evaluation of District-wide food service.
- 18. Maintain effective community relations and interpret financial matters to the community.
- 19. Provide coordination of activities between units within the business services department.
- 20. Advise and assist District staff members on budgets, accounting policies and interpret / apply policies to the various financial functions.

**Source Code** (circle choices)

- |                                      |                                |                                  |  |                              |                                 |
|--------------------------------------|--------------------------------|----------------------------------|--|------------------------------|---------------------------------|
| <b>A. Behavioral Event Interview</b> | <b>B. Direct Documentation</b> | <b>C. Indirect Documentation</b> | <b>D. Training Programs Competency Acquisition</b> | <b>E. Evaluatee Provided</b> | <b>F. Confirmed Observation</b> |
|--------------------------------------|--------------------------------|----------------------------------|--|------------------------------|---------------------------------|

**Rating Code** (circle one)

- |                       |                          |                  |                       |                    |
|-----------------------|--------------------------|------------------|-----------------------|--------------------|
| <b>Unsatisfactory</b> | <b>Needs Improvement</b> | <b>Effective</b> | <b>Very Effective</b> | <b>Outstanding</b> |
|-----------------------|--------------------------|------------------|-----------------------|--------------------|

**3. PROFESSIONAL GROWTH AND IMPROVEMENT**

**Category Definitions**

- 21. Provide technical assistance to assigned employees as needed.
- 22. Provide for the cross-training of personnel within the department.
- 23. Set high standards for self and others.
- 24. Maintain a network of peer contacts through professional organizations.
- 25. Promote and support the professional growth of self and others.

**Source Code** (circle choices)

- |                                      |                                |                                  |  |                              |                                 |
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|--------------------------------------|--------------------------------|----------------------------------|--|------------------------------|---------------------------------|

**Rating Code** (circle one)

- |                       |                          |                  |                       |                    |
|-----------------------|--------------------------|------------------|-----------------------|--------------------|
| <b>Unsatisfactory</b> | <b>Needs Improvement</b> | <b>Effective</b> | <b>Very Effective</b> | <b>Outstanding</b> |
|-----------------------|--------------------------|------------------|-----------------------|--------------------|

**ASSISTANT SUPERINTENDENT FOR BUSINESS AND FINANCE (Continued)**

**4. SYSTEMIC FUNCTIONS**

**Category Definitions**

- 26. Provide information to the Superintendent and School Board on the financial status of the School District and the wise use of its resources through sound business management practices.
- 27. Assist in the development of School Board policies and administrative guidelines.
- 28. Keep abreast of legal requirements and proposed changes in areas of responsibility and provide advice to the Superintendent regarding the impact on the District.
- 29. Supervise assigned personnel, conduct annual performance appraisals and make recommendations for appropriate employment action.
- 30. Prepare all required reports and maintain all appropriate records.
- 31. Act as legislative liaison to represent the District's financial interests.
- 32. Perform other duties as assigned.

**Source Code** (circle choices)

- |                                      |                                |                                  |  |                              |                                 |
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**Rating Code** (circle one)

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|-----------------------|--------------------------|------------------|-----------------------|--------------------|
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|-----------------------|--------------------------|------------------|-----------------------|--------------------|

**5. LEADERSHIP AND STRATEGIC ORIENTATION**

**Category Definitions**

- 33. Direct and coordinate the planning, implementation and evaluation of business services.
- 34. Direct the preparation and administration of the annual School District budget.
- 35. Direct the preparation of financial reports and statements to schools, the District, the state and the federal government.
- 36. Serve as a member of the Superintendent's Executive Leadership Team.

**Source Code** (circle choices)

- |                                      |                                |                                  |  |                              |                                 |
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**ASSISTANT SUPERINTENDENT FOR BUSINESS AND FINANCE (Continued)**

**6. 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, teammanship and communication skills, translating organizational purpose into observable behavior and others.

(Special Note)

**An effective or higher rating is required in this job context category in order to be eligible for an overall effective or higher rating.**

**Source Code** (circle choices)

- |                                      |                                |                                  |  |                              |                                 |
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**Rating Code** (circle one)

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|-----------------------|--------------------------|------------------|-----------------------|--------------------|

**7. ASSESSMENT AND OTHER SERVICES**

**Control Dimension**

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

(Special Note)

**An effective or higher rating is required in this job context category in order to be eligible for an overall Effective or higher rating.**

**Source Code** (circle choices)

- |                                      |                                |                                  |  |                              |                                 |
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|-----------------------|--------------------------|------------------|-----------------------|--------------------|

**ASSISTANT SUPERINTENDENT FOR BUSINESS AND FINANCE (Continued)**

**OVERALL RATING: (enter total scores)**

Input from parents and teachers was collected and analyzed in preparation of this report.

Unsatisfactory \_\_\_\_\_ Needs Improvement \_\_\_\_\_ Effective \_\_\_\_\_ Very Effective \_\_\_\_\_ Outstanding \_\_\_\_\_

**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**