

Confidential Employee Self-Evaluation and Supervisor Evaluation

	Business Manager	
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Employee

Position Title

Date

0. Not Applicable or Observed

3. Expected Performance

E=Employee

1. Unsatisfactory Performance

4. Exceeds Expected Performance

S=Supervisor

2. Average Performance

E	S	<u>I. Personal Qualities</u>
		Presents a positive attitude
		Communicates & works cooperatively with other staff members & public
		Is neat in appearance & dresses appropriately
		Maintains confidentiality & honesty
		Functions in a positive attitude in stressful situations

Category Evaluation

	Employee		Supervisor
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E	S	<u>II. General</u>
		Performs clerical duties as needed
		Performs duties in a timely, discreet, & efficient manner.
		Types & calculates with speed & accuracy
		Participates in required training
		Follows District policy/handbook

Category Evaluation

	Employee		Supervisor
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E	S	<u>III. Fiscal</u>
		Is bonded
		Prepares financial reports and records
		Maintains ledgers and journals

		Maintains financial transactions records
		Reconciles PR & AP checks and verifies bank balances
		Coordinates information for the computer
		Serves as liaison with banking institution
		Invests revenue & controls cash flow
		Assists in preparation of budget
		Organizes computerized district budget
		Sends necessary budget materials to the proper agencies as required
		Furnishes information during budgeting process
		Posts, deposits, and codes revenues
		Assumes the responsibility of accounting for all income and disbursements
		Audits all claims, pays bills & contracts
		Maintains accounts and procedures
		Prepares a monthly expenditure and balance report
		Traces errors and records adjustments
		Verifies all amounts before processing checks
		Assists the Superintendent in the preparation of required applications & reports
		Serves as Foundation Treasurer.

		Performs other duties as assigned by the Superintendent
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Category Evaluation

	Employee		Supervisor
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E	S	IV. Timeliness
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		Turns in time sheet as required
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		Meets deadlines
		Attends meetings as required
		Arrives on time, works scheduled hours
		Notifies the Superintendent in event of illness

Category Evaluation

	Employee		Supervisor
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1. I feel I have shown development and growth in my position because: (list classes taken, workshops attended, independent study, etc.)

2. Commendations or areas during the last year for which I would like to be recognized are:

3. List areas of participation and/or accomplishment outside the position responsibilities that are job related: (i.e. site councils, committees, task forces, clubs, activities, coaching, etc.) Do not include community or civic activities outside of your job description.

Overall Evaluation

	Employee		Supervisor
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Evaluator's Recommendation for:

- _____ Continued Employment
- _____ Plan of Assistance
- _____ Termination

Comments:

Evaluator's Signature

Date

I have read this appraisal of my performance and discussed it with the evaluator.

Employee's Signature

Date

Statement by employee attached. _____ Yes _____ No