

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

Name _____ Position ASST. SUPERINTENDENT FOR ADMINISTRATION

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 <input type="checkbox"/> | Exemplary <input type="checkbox"/> | Effective <input type="checkbox"/> | Needs Improvement <input type="checkbox"/> | Unsatisfactory <input type="checkbox"/> | |
| 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
ASSISTANT SUPERINTENDENT FOR ADMINISTRATION**

Name _____

School / Dept. _____ School Year _____

1. SERVICE DELIVERY

Category Definitions

1. Administer the functions of financial services including budgeting, financial accounting, program cost reporting, accounts payable, cash receipts and cash flow.
2. Administer functions of payroll and the employee benefits program.
3. Coordinate the preparation of financial reports as required by state and federal agencies having jurisdiction over public school funds.
4. Coordinate the preparation and submittal of monthly financial statements to the Superintendent and School Board.
5. Assist in arriving at collective bargaining.
6. Facilitate and oversee the ongoing financial audit process by other agencies, respond to auditors' concerns and questions during such audits and coordinate the District's formal response to such audits.
7. Arrange for and oversee the required audit of internal accounts.
8. Conduct follow-up activities to remedy financial audit report findings of an adverse nature.
9. Oversee District's 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.
10. Coordinate and manage the acquisition and disposition of property in coordination with other person's assigned responsibility for property control.
11. Review project ledgers on construction projects and routinely reconcile to accounting records the project expenditures and architect and contractor billing.
12. Provide overall supervision of the District's investment program.
13. Coordinate the preparation of the Superintendent's Annual Financial Report.
14. Coordinate application for use of impact funds when applicable.
15. Oversee the District-wide transportation program, including program planning/implementation and evaluation, to meet requirements of the daily instructional program and extracurricular activities.
16. Oversee the school food and nutrition program to ensure it is operated in accordance with federal laws, State Board of Education regulations and School Board policies.

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. Maintain effective community relations and interpret financial matters to the community.
18. Enhance financial services by serving on local committees, visiting schools and making presentations.
19. Provide assistance to schools and departments in preparing and maintaining budgets.
20. Serve as a liaison between the School Board and other County governmental agencies or groups having an interest in schools.

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 Choices) 16 14 12 6 0

Name

3. PROFESSIONAL GROWTH AND IMPROVEMENT

Category Definitions

- 21. Provide technical assistance to employees as needed.
- 22. Provide for 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.

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|--------------------------------|---|---|---|---|--|
| Source Code (Check Choices) | <input type="checkbox"/> A. Direct Documentation | <input type="checkbox"/> B. Indirect Documentation | <input type="checkbox"/> C. Training Programs Competency Acquisition | <input type="checkbox"/> D. Evaluatee Provided | <input type="checkbox"/> E. Confirmed Observation |
| Rating Code (Check Choice) | <input type="checkbox"/> Outstanding 16 | <input type="checkbox"/> Exemplary 14 | <input type="checkbox"/> Effective 12 | <input type="checkbox"/> Needs Improvement 6 | <input type="checkbox"/> Unsatisfactory 0 |

4. SYSTEMIC FUNCTIONS

Category Definitions

- 26. Provide information to Superintendent on financial status of school system and wise use of its resources.
- 27. Assist in preparing for and conducting collection bargaining as applicable.
- 28. Assist in the preparation of grant applications as applicable.
- 29. Participate in the process of developing District compensation plans as applicable.
- 30. Post and balance bond register as payments are made and coupons received.
- 31. Assist with the development of District FTE projections, the district FTE per survey periods for possible financial impact.
- 32. Assist in the development of administrative guidelines and policies.
- 33. Assist in the preparation of the School Board agenda, preparing finance and business services action items of a routine and priority nature.
- 34. Supervise assigned personnel, conduct annual performance appraisals and make recommendations for appropriate employment action.
- 35. Prepare or supervise the preparation of all required reports and the maintenance of all appropriate records.
- 36. Keep abreast of legal requirements and proposed changes in areas of responsibility and provide advice to the Superintendent regarding impact on the District.
- 37. Maintain liaison with federal, state and local agencies regarding operations of the department.
- 38. Act as legislative liaison to represent the District's financial interests as assigned.
- 39. Perform other incidental tasks consistent with the goals and objectives of the District and this position.

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|--------------------------------|---|---|---|---|--|
| Source Code (Check Choices) | <input type="checkbox"/> A. Direct Documentation | <input type="checkbox"/> B. Indirect Documentation | <input type="checkbox"/> C. Training Programs Competency Acquisition | <input type="checkbox"/> D. Evaluatee Provided | <input type="checkbox"/> E. Confirmed Observation |
| Rating Code (Check Choice) | <input type="checkbox"/> Outstanding 20 | <input type="checkbox"/> Exemplary 18 | <input type="checkbox"/> Effective 16 | <input type="checkbox"/> Needs Improvement 8 | <input type="checkbox"/> Unsatisfactory 0 |

5. LEADERSHIP AND STRATEGIC ORIENTATION

Category Definitions

- 40. Direct and coordinate the planning, implementation and evaluation of finance and business services necessary for the efficient operation of the school system.
- 41. Function as the budget control officer with responsibility for yearly development of the School District budget, including all TRIM requirements and administration for all funds.
- 42. Understand, analyze and evaluate the system of internal control comprised of the accounting system structure methods of documentation, operating procedures and personnel assignments.
- 43. Provide vision and leadership for implementation of technology in business and financial services.
- 44. Assist in District-wide comprehensive planning to relate the use of financial and human resources to District goals and objectives.
- 45. Serve on the Superintendent's Executive Management Team.

| | | | | | |
|--------------------------------|---|---|---|---|--|
| Source Code (Check Choices) | <input type="checkbox"/> A. Direct Documentation | <input type="checkbox"/> B. Indirect Documentation | <input type="checkbox"/> C. Training Programs Competency Acquisition | <input type="checkbox"/> D. Evaluatee Provided | <input type="checkbox"/> E. Confirmed Observation |
| Rating Code (Check Choice) | <input type="checkbox"/> Outstanding 18 | <input type="checkbox"/> Exemplary 16 | <input type="checkbox"/> Effective 14 | <input type="checkbox"/> Needs Improvement 7 | <input type="checkbox"/> Unsatisfactory 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.

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)

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.

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)