

SAMPLE TREASURER/BUSINESS MANAGER EVALUATION

GUIDELINES

1. The Treasurer/Business Manager shall know the standards against which he will be evaluated.
2. An evaluation shall occur at least once a year. (For a new Treasurer on a two year probationary contract, it is recommended that evaluation occur at least twice each year.)
3. Both parties should prepare for the evaluation - The Treasurer/Business Manager, by conducting a self-evaluation, and the Board, by examining various sources of information relating to the individual's performance.
4. The evaluation shall be a composite profile of Board Members responses. The composite profile should be prepared by the Board President. The evaluations should include a discussion of strengths as well as areas for improvement. Each judgement on the evaluation should be supported by as much rational and objective evidence as possible.

INSTRUCTIONS

1. Read carefully the rating descriptions.
2. Mark the number in the space that is most descriptive of the actual performance. If you are unable to evaluate any specific item, leave the box blank. If the question is not applicable to the position being evaluated, mark N/A.

RATING DESCRIPTIONS

- N/A Not Applicable
- 1 Inadequate
- 2 Needs improvement
- 3 Satisfactory
- 4 Above average
- 5 Superior

TECHNICAL SKILLS - Consider the technical and professional knowledge of the Treasurer/ Business Manager in the understanding of the following as it relates to his job.

1. Communicates with Board and Superintendent on the current status of financial matters, problems, and other matters that affect the district. _____
2. Renders timely and accurate financial statement to Board and Superintendent. _____
3. Serves as chief financial officer and advisor to Board and Superintendent. _____
4. Recommends policy revisions pertaining to his area of responsibility. _____
5. Prepares agenda items and appropriate recommendations. _____
6. Serves as secretary to Board and prepares clear and accurate minutes of all Board meetings. _____
7. Works cooperatively with all Board members without regard to opinions/positions of individual Board members. _____
8. Serves as a participating/contributing member of the district's management team. _____

- 9. Works cooperatively with Superintendent and other administrators. _____
- 10. Provides the board with concise, meaningful financial and business operations data. _____
- 11. Keeps the Board informed of new and potential legislation affecting finance and business operations. _____
- 12. Keeps the Board informed on budget matters as they change during the year. _____
- 13. Maintains an open door policy for questions from members of the public, community organizations, and employees. _____
- 14. Keeps the Board and Superintendent apprised of necessary certification requirements. _____
- 15. Maintains the school district's accounting records accurately, up-to-date in accordance with prescribed accounting requirements. _____
- 16. Furnishes timely management accounting data/summaries in accordance with the needs/desires of the Board, Superintendent, and other administrators. _____
- 17. Responds to requests for management accounting data. _____
- 18. Prepares timely and accurate reports required by other governmental agencies. _____
- 19. Prepares and manages payroll system so that employees are compensated in a timely and forthright manner. _____
- 20. Works cooperatively with other administrators to ensure evaluation and updating of management information system(s) _____
- 21. Plans and manages an investment program to maximum interest income. _____
- 22. Has established/maintained and updated internal control systems to account for the receipt, safeguarding, and disbursement of school district's cash assets, including student activity program funds. _____
- 23. Makes self available as Board's representative at public meetings when needed or requested. _____
- 24. Has established procedures to ensure district's funds are used wisely for the achievement of the purposes for which they were allocated. _____
- 25. Has established procedures for the maximum efficiency of the following operations:
 - a. accounting _____
 - b. financial reporting _____
 - c. business operations _____
 - d. receipting of moneys _____
 - e. purchasing and receiving _____
 - f. payroll _____
 - g. payment of vendors and contractors _____
 - h. all other areas of fiscal management _____

COMPOSITE EVALUATION _____

COMMENTS AND/OR SUGGESTIONS - JOB GOALS

PERSONAL CHARACTERISTICS - Impressions the individual makes on others by his actions.

- 1. Exhibits enthusiasm for his work. _____
- 2. Devotes his time and energy effectively to this job. _____
- 3. Maintains high standards of ethics, honesty, and integrity in all personal and professional matters. _____
- 4. Defends principle and conviction in the face of pressure and partisan influence. _____
- 5. Is customarily suitably attired and well groomed. _____
- 6. Attempts to correct personal habits and mannerisms which detract from affective leadership. _____
- 7. Maintains poise and emotional stability in the full range of his professional activities. _____
- 8. Exhibits patience. _____
- 9. Exercises good judgement/common sense in arriving at decisions. _____
- 10. Earns respect and standing among his professional colleagues. _____
- 11. Demonstrates ability to work well with individuals and groups _____
- 12. Treats all personnel fairly, without favoritism or discrimination, while insisting on performance of duties. _____
- 13. Has a harmonious working relationship with Board, Superintendent, and other staff members. _____
- 14. Exhibits punctuality and regularity of attendance to the office, at meetings and with reports. _____
- 15. Accepts constructive criticism profitably. _____
- 16. Accepts administrative decisions and works enthusiastically toward achieving goals even though they may not conform to personal ideas. _____
- 17. Abides by district policy and philosophy in work and activities. _____
- 18. Attempts to see the overall picture. _____
- 19. Thinks well on his feet when faced with an unexpected or disturbing turn of events. _____

COMPOSITE EVALUATION _____

COMMENTS AND/OR SUGGESTIONS - JOB GOALS

SUMMARY COMPOSITE

TECHNICAL SKILLS _____

PROFESSIONAL CHARACTERISTICS _____

PERSONAL CHARACTERISTICS _____

COMMENTS AND/OR SUGGESTIONS - JOB GOALS

[Adoption date: August 6, 1991]