

EVALUATING YOUR SCHOOL BUSINESS OFFICIAL

Developing an evaluation system for an SBO can be an effective way to assess the performance and productivity of a key employee. In many school districts, there are typically evaluation processes, forms and methodologies that apply to instructional and operational personnel, but they fall short in providing appropriate summative and formative feedback for school business personnel.

In the following pages, you will find:

- A brief summary of potential methods for conducting effective employee evaluations.
- FAQs regarding statutory evaluation guidelines for school business personnel.
- Sample Goal Setting Worksheet.
- Sample Leadership Competencies Evaluation Instrument applicable to all positions.
- Sample Role Competency Evaluation Instrument for SBOs.

Note: Your evaluation should be modified to apply specifically to the role your SBO plays.

To use these tools effectively, an evaluator should take the following steps:

1. Determine the method of evaluation that is to be applied. **See the Methods of Conducting Employee Evaluations on the next page.**
2. If using the **Leadership Competency Evaluation** method along with goal setting or role competency, download the resource and make modifications as necessary based on the job description to reflect the expectations for the individual in the school business role.
3. If using a method other than simple goal setting, use the **Role Competency Evaluation** to access position requirements. Download the evaluation and make modifications based on your job description for the position.

Note: The documents associated with this resource are samples and Illinois ASBO assumes no responsibility for legal liability for the use of the materials by a school district. Please consult a qualified attorney on questions related to the legal implications of evaluation and subsequent or accompanying employment.

Methods of Conducting Employee Evaluations

There are many ways to conduct an evaluation. Some common methods that can be incorporated into the evaluation process for SBOs may include:

Goal Setting

This allows both the supervisor and the employee to determine goals for the coming year. In subsequent years, these goals are reviewed and new goals are created.

Standardized Scale

In this method, the supervisor rates the employee using a scale system. This can be combined with goal setting.

Self-Assessment

Evaluation approach can be incorporated into most methods and gives the employee an opportunity to objectively reflect on their performance. They can consider what they have done well, where they have done and where they have fallen short and share their perspective with their supervisor.

Gap Analysis

Recognizing the value of self-evaluation, in this method both the supervisor and employee fill out the standardized scale evaluation. Gaps are identified between the employee's and supervisor's views of the employee's role and leadership competencies. These "gaps" can then become areas of focus for discussion and goal setting.



Frequently Asked Questions Regarding the Statutory Evaluation Guidelines for School Business Personnel

Who evaluates an SBO?

An SBO is typically evaluated by the superintendent. There are no statutory requirements that stipulate the method of evaluation (unlike the evaluation of teachers and principals).

How do SBO evaluations relate to the Performance Evaluation Reform Act (PERA) laws?

According to the Illinois State Board of Education, PERA requires all schools in Illinois to design and implement performance evaluation systems that assess teachers' and principals' professional skills, as well as incorporate measures of student growth. As PERA evaluations relate only to instructional personnel, there are no requirements for the method or type of evaluation used for school business officials.

GOAL SETTING WORKSHEET

Employee Name: _____

Supervisor Name: _____

Date: _____

Goals Suggested by Employee:

Goals Suggested by Supervisor:

Goals Approved for the Next Fiscal Year:

Comments:

ROLE COMPETENCY EVALUATION

This is intended as a sample. Choose the competencies specifically referenced in the job description of the employee.

For each item, based on your knowledge of the performance of the employee, circle on the scale between 1 and 10. The scale is described below.

Does Not Meet Expectations ← 1 2 3 4 5 6 7 8 9 10 → **Exceeds Expectations**

A comments section is included on the online form. Comments are encouraged, but are required for any competency with a ranking below 5.

1. BUDGETING AND LEVYING.

Prepares the budget, presentation and justification to the Board of Education, including the annual levy.

2. FINANCIAL PLANNING.

Prepares enrollment and long-range plans to meet the student and financial needs of the district. This may include multi-year projections of revenues and expenses and the feasibility of long-term funding for special projects and instructional improvement.

3. CLAIMS AND REPORTING.

Oversees the preparation of GSA and transportation claim as well as claims for other state and federal categorical programs. Oversees implementation of grants.

4. ACCOUNTING AND FINANCE SYSTEMS.

Performs functions related to accounting and reporting, which may include but is not limited to bills payable, transfer of funds and management of activity funds.

5. BANKING AND INVESTMENTS.

Manages banking relationships and ensures appropriate and effective investment of school district funds.

6. AUDIT PREPARATION AND ANNUAL FINANCIAL REPORTING.

Files a financial report annually for audit and implements audit suggestions on a timely basis.

7. PURCHASING AND SUPPLY MANAGEMENT.

Coordinates or oversees the purchase, maintenance and inventory of all supplies, including purchase by competitive bidding and management of contracts as directed by the Illinois School Code and Board Policy.

8. PERSONNEL MANAGEMENT.

Supervises the staff accounting, payroll benefits and all related data in the area of personnel administration.

9. COLLECTIVE BARGAINING.

Prepares pertinent fiscal data for negotiations, including data related to benefit programs.

1. RECORDS MANAGEMENT.

Oversees procedures and maintenance of district property, finance records and the annual financial audit.

2. PROGRAM MANAGEMENT.

Oversees the operation of the total school business services program including day-to-day district finance and business operations, recruitment and evaluation of staff.

3. INSURANCE AND RISK MANAGEMENT.

Represents the district's interests in all insurance and risk management programs.

4. TRANSPORTATION SERVICES.

Administers or oversees the district transportation program and prepares and administers the budget.

5. FACILITY OPERATIONS.

Administers a program of plant operation and maintenance, security and property protection and community use of school facilities.

6. PLANNING AND CONSTRUCTION.

Participates in decision-making process and selection of professional services. Works with architects and contractors to ensure desired project results in construction and remodeling of facilities and understands and carries out the legal responsibilities of the district.

7. FOOD SERVICE.

Oversees all operations and contracts. Applies State and Federal guidelines for free/reduced meal subsidies. Takes part with regulatory agencies in the planning and reporting of food service program.

8. HEALTH AND SAFETY.

Develops and implements a process for assessing potential safety hazards. Assists in the preparation of a district disaster preparedness and recovery plan.

9. COMMUNITY RELATIONS.

Prepares enrollment projections and financial information for referendums. Effectively communicates financial and operational issues to the public. Represents the mission and goals of the district to the community.

10. GENERAL ADMINISTRATION.

Acts as advisor to the superintendent concerning financial affairs and matters of general importance to the educational program. Participates in decision-making and policy development.

11. PROFESSIONAL DEVELOPMENT.

Sets goals and participates in activities to maintain knowledge and skills and stay abreast of school finance related issues.

LEADERSHIP COMPETENCY EVALUATION

This is intended as a sample. Choose the competencies specifically referenced in the job description of the employee.

For each item, based on your knowledge of the performance of the employee, circle on the scale between 1 and 10. The scale is described below.

Does Not Meet Expectations ← 1 2 3 4 5 6 7 8 9 10 → **Exceeds Expectations**

A comments section is included on the online form. Comments are encouraged, but are required for any competency with a ranking below 5.

- 1. RESPECT.** Establishes and maintains a reputation of respect with the key stakeholders of the district.
- 2. FOLLOW THROUGH.** Follows through on all commitments and promises with an appropriate sense of urgency.
- 3. INNOVATION.** Values and actively encourages creative and innovative ideas from staff and key stakeholders. Anticipates and seizes new opportunities.
- 4. PRIORITIZING.** Manages time and resources effectively according to district and professional/ personal goals. When necessary, makes personal sacrifices to assure results.
- 5. DELEGATION.** Broadly shares both responsibility and accountability with individuals or groups based on their skills, experience and available time. Clarifies roles amongst staff.
- 6. EXPRESSING IDEAS.** Writes clearly, concisely and persuasively. Speaks in a clear and articulate manner, adapting content and style to different audiences and venues.
- 7. MAKING A CASE.** Appeals to emotions and/ or reason using data, concrete examples and demonstrations when talking with board of education, community members and the media.
- 8. MEETINGS.** Effectively prepares for Board of Education meetings, including setting clear objectives, agendas, advance materials and appropriate time management. Provides opportunities for input.
- 9. TRUST.** Gains the trust of all stakeholders by actively listening and seeking to understand their views and needs. Avoids bureaucratic responses.
- 10. INSIGHT.** Understands his/her strengths and weaknesses and circumstances in which they become most important.
- 11. SEEKING GROWTH.** Actively seeks constructive feedback and other opportunities for self-development. Takes responsibility for his/her own behavior, mistakes and results as well as learns from successes and failures.
- 12. CONFLICT.** Models appropriate responses to conflict, encouraging others to manage conflict openly and productively. Settles disputes fairly.
- 13. VISION, MISSION, VALUES AND GOALS.** Effectively establishes and articulates a compelling vision that aligns with the district's broader mission, vision and values. Cascades these goals and values throughout the district.
- 14. NETWORKING.** Seeks opportunities to work with a wide range of individuals and organizations inside and outside of the district to achieve better outcomes.
- 15. MANAGING CHANGE.** Effectively manages change by setting new direction, seeking to understand the effects of change on the district and stakeholders.
- 16. RESILIENCE.** Demonstrates tenacity in the face of adversity, persevering through significant challenges to reach long- and short-term goals.