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

**Instructions:** For each item below, 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 at the end of the form. Comments are encouraged, but required for any ranking below five.

1. **BUDGETING AND LEVYING.** Prepares the budget, presentation and justification to the Board of Education, including the annual levy.

1 2 3 4 5 6 7 8 9 10

1. **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.

1 2 3 4 5 6 7 8 9 10

1. **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.

1 2 3 4 5 6 7 8 9 10

1. **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.

1 2 3 4 5 6 7 8 9 10

1. **BANKING AND INVESTMENTS.**  Manages banking relationships and ensures appropriate and effective investment of school district funds.

1 2 3 4 5 6 7 8 9 10

1. **AUDIT PREPARATION AND ANNUAL FINANCIAL REPORTING.** Files a financial report annually for audit and implements audit suggestions on a timely basis.

1 2 3 4 5 6 7 8 9 10

1. **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.

1 2 3 4 5 6 7 8 9 10

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

1 2 3 4 5 6 7 8 9 10

1. **COLLECTIVE BARGAINING.** Prepares pertinent fiscal data for negotiations, including data related to benefit programs.

1 2 3 4 5 6 7 8 9 10

1. **RECORDS MANAGEMENT.** Oversees procedures and maintenance of district property and finance records and the annual financial audit

1 2 3 4 5 6 7 8 9 10

1. **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.

1 2 3 4 5 6 7 8 9 10

1. **INSURANCE AND RISK MANAGEMENT** Represents the district’s interests in all insurance and risk management programs.

1 2 3 4 5 6 7 8 9 10

1. **TRANSPORTATION SERVICES.** Administers or oversees the district transportation program and prepares and administers the budget.

1 2 3 4 5 6 7 8 9 10

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

1 2 3 4 5 6 7 8 9 10

1. **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.

1 2 3 4 5 6 7 8 9 10

1. **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.

1 2 3 4 5 6 7 8 9 10

1. **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.

1 2 3 4 5 6 7 8 9 10

1. **COMMUNITY RELATIONS.** Prepares enrollment projections and financial information for referendums.

1 2 3 4 5 6 7 8 9 10

1. **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.

1 2 3 4 5 6 7 8 9 10

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

1 2 3 4 5 6 7 8 9 10

Comments: