

ARLINGTON LOCAL SCHOOL DISTRICT
STAFF PERFORMANCE ASSESSMENT

from _____ to _____

NAME: _____ TITLE _____

DEPARTMENT: _____

ESSENTIAL JOB FUNCTIONS:

	<u>Excellent</u>	<u>Satisfactory</u>	<u>Needs Improvement</u>
Ensure safety of students	[]	[]	[]
Serve as treasurer and chief fiscal officer to the board of education	[]	[]	[]
Call special meetings of the board of education as needed	(]	[]	[]
Attend and record all meetings and proceedings of the board of education	[]	[]	[]
Sign all checks of the board of education	[]	[]	[]
Prepare purchase orders weekly	[]	[]	[]
Adhere to purchase order system with purchase order to be approved by treasurer only on a "funds available" basis	[]	[]	[]
Certify all purchase orders and requisitions for supplies and services	[]	[]	[]
Set up and control an encumbrance accounting system including the establishment and supervision of internal accounting controls and provide in-service training to staff	[]	[]	[]
Work cooperatively with the superintendent in preparation of the annual appropriation resolution, and the annual budget, and long-range planning	[]	[]	[]
Deduct from wages and salaries of teachers/employees amounts authorized	[]	[]	[]
Maintain certified and classified personnel records including, sick, vacation, and personal leave records	[]	[]	[]
Ensure payroll is processed bi-monthly	[]	[]	[]
Responsible for preparing and signing all employee contracts	[]	[]	[]
Prepare salary notices	[]	[]	[]
Maintain a record of retirement contributions	[]	[]	[]

Obtain and file teaching certificates	[]	[]	[]
Provide and counsel staff members in the areas of insurance benefits, retirement provisions, local tax laws, provisions of sick leave policy and other information concerning fringe benefits	[]	[]	[]
Prepare and issue written notice of intention not to re-employ certificated and classified staff	[]	[]	[]
Responsible for the preparation and maintenance of all necessary earning records, deductions records and similar personnel payment records	[]	[]	[]
Maintain respect at all times for confidential information, e.g., certified and classified personnel files; executive session information held by the board of education	[]	[]	[]
Invest monies of the district to secure the best interest rate	[]	[]	[]
Direct and manage all accounting programs and systems as prescribed by law	[]	[]	[]
Provide a monthly report of accounts, funds, and fiscal status and funds to the superintendent and board of education	[]	[]	[]
Provide the necessary certification for the board of education	[]	[]	[]
Maintain sick, vacation, and personal leave records for all certified and classified personnel	[]	[]	[]
Maintain a system of control for inventories of equipment for fixed asset records, as well as a record of consumables	[]	[]	[]
Responsible for GAAP – fixed asset and consumable inventory	[]	[]	[]
Report at least once a year the assets and liabilities of the school district	[]	[]	[]
Notify the board of elections of all changes in boundaries of the district	[]	[]	[]
File statements with the county auditor in the prescribed manner as required by law	[]	[]	[]
Meet all the qualifications specified for the position of school district treasurer as prescribed by law	[]	[]	[]
Increase the efficient use of resources toward the achievement of district goals	[]	[]	[]
Help interpret the budget and district affairs under his/her supervision to interest members of the community	[]	[]	[]

Promote professional excellence and improve the skills necessary to maintain on-the-job performance	[]	[]	[]
Attend workshops and in-services relative to the performance of his/her position	[]	[]	[]
Supervise and evaluate the assistant treasurer-payroll	[]	[]	[]
Interact and maintain cooperative relationships with other school district treasurers, the county auditor, the state auditor's office, and the county educational service center	[]	[]	[]
Submit annual budget by January 20 th of each calendar year	[]	[]	[]
Responsible for developing and recommending for adoption a student activity handbook, and a purchasing procedure manual	[]	[]	[]
Prepare a financial projection worksheet	[]	[]	[]
Receive, deposit and account for all school funds of the district	[]	[]	[]
Receive and preserve all vouchers for payment and disbursement made to and by the board	[]	[]	[]
Make available to members of the board and to the administration all papers and documents entrusted to the treasurer for filing as well as to have them available for public inspection whenever necessary and as prescribed by law	[]	[]	[]
Shall present to the board annually, and keep on record for the board's information, a complete listing of all insurance policies and premiums on all district properties	[]	[]	[]
Complete and file at proper times all forms, reports, papers, and other requirements as prescribed by the auditor, department of education or other state or local agencies	[]	[]	[]
Must have on file all employee contracts	[]	[]	[]
Receive all monies belonging to the district, including payment of taxes from the county treasurer	[]	[]	[]
Render a full annual report at the end of each fiscal year	[]	[]	[]
Maintain a record a bond buyers	[]	[]	[]
Pay out district monies on written order of designated officials of the board	[]	[]	[]
Maintain a filing system for board business and board transactions	[]	[]	[]

Responsible for handling of communications and correspondence for the board of education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prepare advertisement of all legal notices concerning board business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Act as financial resource person for the board's negotiating team and at all public meetings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provide general administration of the board insurance program	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prepare necessary paperwork for operating levies and bond issues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recommend new accounting methods as necessary	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recommend policy revisions pertaining to his/her area of responsibility	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Make contracts with the public with tact and diplomacy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Maintain respect at all times for confidential information, e.g. negotiations information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Interact in a positive manner with staff, students and parents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Promote good public relations by personal appearance, attitude and conversation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attend meetings and in-services as required	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments:

OTHER DUTIES AND RESPONSIBILITIES:

	<u>Excellent</u>	<u>Satisfactory</u>	<u>Needs Improvement</u>
Cooperate with superintendent in the development and implementation of administrative and board policies	[]	[]	[]
Attend meetings and conferences designed to enhance	[]	[]	[]
Professional qualifications	[]	[]	[]
Handle communication and correspondence for the board of education	[]	[]	[]
Respond to routine questions and requests in an appropriate manner	[]	[]	[]
Perform other duties as assigned by the superintendent and/or board of education	[]	[]	[]

Comments:

PROFESSIONAL CHARACTERISTICS:

	<u>Excellent</u>	<u>Satisfactory</u>	<u>Needs Improvement</u>
Appearance (dresses appropriately)	[]	[]	[]
Adaptability (adjustment to change, ability to learn)	[]	[]	[]
Interpersonal skills (considerate, respected, communicative)	[]	[]	[]
Cooperation (relations with management and co-workers, Teamwork, supportive)	[]	[]	[]
Judgment (decisive, insightful, responsive)	[]	[]	[]
Attitude (initiative, motivation, enthusiasm)	[]	[]	[]
Knowledgeable (awareness, confidence, innovative)	[]	[]	[]
Dependability (reliability, honesty, trustworthy, attendance)	[]	[]	[]

Comments:

JOB GOALS:

Previous expectations

Comments:

Future goals

COMMENTS BY EMPLOYEE:

Comments:

DATE _____ EVALUATOR _____

DATE _____ EMPLOYEE _____
(Signature of employee does not indicate approval or disapproval)

Adoption Date: April 21, 1998