

SCHOOL DISTRICT OF GADSDEN COUNTY

BUDGET DIRECTOR

PERFORMANCE APPRAISAL

Name _____ Position _____

School / Dept. _____ School Year _____

1. SERVICE DELIVERY

Category Definitions

1. Assists with the staffing plan. Leads strategic planning and staffing responsibilities.
2. Actively monitors and updates the budget during the fiscal period for changes in FEFP, etc.
3. Responsible for the operational management and administrative direction of the overall District budget and supports the mission and vision of the department/program and the District.
4. Recommends, interprets, and implements fiscal and accounting administrative policies and procedures.
5. Assist and / or direct the investigation of errors and complaints.
6. Serves as the backup to the Treasury Manager for drawn down of funds to pay accounts payable and cash forecasting of cash flow.
7. Perform other duties as assigned by Assistant Superintendent for Business and Finance.

Source Code (circle choices)

- | | | | | | |
|-------------------------------|-------------------------|---------------------------|---------------------------------------------|-----------------------|--------------------------|
| A. Behavioral Event Interview | B. Direct Documentation | C. Indirect Documentation | D. Training Programs Competency Acquisition | E. Evaluatee Provided | F. Confirmed Observation |
|-------------------------------|-------------------------|---------------------------|---------------------------------------------|-----------------------|--------------------------|

Rating Code (circle one)

- | | | | | |
|----------------|-------------------|-----------|----------------|-------------|
| Unsatisfactory | Needs Improvement | Effective | Very Effective | Outstanding |
|----------------|-------------------|-----------|----------------|-------------|

BUDGET DIRECTOR (Continued)

2. INTERAGENCY COMMUNICATION AND DELIVERY

Category Definitions

- 8. Understand, manage, and supervise all aspects of the budget and budgetary process.
- 9. Conducts budget committee meetings to formulate the fiscal year budget.
- 10. Prepares and monitors revenue projections for annual and long term budgets. Informs Assistant Superintendent for Business and Finance of significant changes in projections so that corrective action may be taken.
- 11. Conducts monthly reviews of project and program budget status and discuss with the department/program directors.
- 12. Manage relationships with all concerned parties regarding the budget, both internal and external.
- 13. Provides budget amendments for Board approval.

Source Code (circle choices)

- | | | | | | |
|--------------------------------------|--------------------------------|----------------------------------|----------------------------------------------------|------------------------------|---------------------------------|
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|--------------------------------------|--------------------------------|----------------------------------|----------------------------------------------------|------------------------------|---------------------------------|

Rating Code (circle one)

- | | | | | |
|-----------------------|--------------------------|------------------|-----------------------|--------------------|
| Unsatisfactory | Needs Improvement | Effective | Very Effective | Outstanding |
|-----------------------|--------------------------|------------------|-----------------------|--------------------|

3. PROFESSIONAL GROWTH AND IMPROVEMENT

Category Definitions

- 14. Provides leadership and direction in policy/procedural development and implementation to ensure greater accountability over the District budget to maintain proper budget protocols.
- 15. Understand and manage appropriate accounting procedures and processes.
- 16. Participate in workshops and training sessions as assigned.
- 17. Participates in the FSFOA conference along with the Assistant Superintendent of Business and Finance.

Source Code (circle choices)

- | | | | | | |
|--------------------------------------|--------------------------------|----------------------------------|----------------------------------------------------|------------------------------|---------------------------------|
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|--------------------------------------|--------------------------------|----------------------------------|----------------------------------------------------|------------------------------|---------------------------------|

Rating Code (circle one)

- | | | | | |
|-----------------------|--------------------------|------------------|-----------------------|--------------------|
| Unsatisfactory | Needs Improvement | Effective | Very Effective | Outstanding |
|-----------------------|--------------------------|------------------|-----------------------|--------------------|

BUDGET DIRECTOR (Continued)

4. SYSTEMIC FUNCTIONS

Category Definitions

- 18. Responsible for formulating and administrating the annual operating budget and ensures appropriate expenditure for all funds allocated for department administration.
- 19. Maintain compliance with TRIM requirements.
- 20. Ensure that School Board policies and governmental regulations are consistently applied to assignment,
- 21. Assist Assistant Superintendent for Business and Finance with the Annual Financial Report.
- 22. Prepares and documents assigned footnotes for inclusion in the Annual Financial Report.
- 23. Assist external auditor with documentation requests and provide responses to business process inquiries.
- 24. Maintain confidentiality at all times regarding all matters related to assignment.
- 25. Maintain work area in a safe and secure manner.
- 26. Assist the Assistant Superintendent for Business and Finance with required reports.

Source Code (circle choices)

- A. Behavioral Event Interview
- B. Direct Documentation
- C. Indirect Documentation
- D. Training Programs Competency Acquisition
- E. Evaluatee Provided
- F. Confirmed Observation

Rating Code (circle one)

- Unsatisfactory
- Needs Improvement
- Effective
- Very Effective
- Outstanding

5. LEADERSHIP AND STRATEGIC ORIENTATION

Category Definitions

- 27. Responsible for developing and maintaining partnerships throughout the District in order to attain District's goals and objectives.
- 28. Keeps track of revenue receipts and assists Assistant Superintendent for Business and Finance in resolving delinquent revenue receipts.
- 29. Provides guidance and direction to senior District management involved in fiscal and accounting services and programs, which may include grant compliance, budget analysis, account reconciliation, and other areas affecting the budget such as purchasing, payroll, collections, and financial reporting.

Source Code (circle choices)

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Rating Code (circle one)

- Unsatisfactory
- Needs Improvement
- Effective
- Very Effective
- Outstanding

BUDGET DIRECTOR (Continued)

6. WORKSITE SERVICE STANDARDS

Control Dimension

Student growth and achievement, the work ethic, fostering and developing professional image, collaboration and affirmative networking, systemic and systematic preparation for function delivery, interpersonal interaction, teammanship and communication skills, translating organizational purpose into observable behavior and others.

(Special Note)

An effective or higher rating is required in this job context category in order to be eligible for an overall effective or higher rating.

Source Code (circle choices)

- | | | | | | |
|-------------------------------|-------------------------|---------------------------|---------------------------------------------|-----------------------|--------------------------|
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Rating Code (circle one)

Unsatisfactory
Needs Improvement
Effective
Very Effective
Outstanding

7. ASSESSMENT AND OTHER SERVICES

Control Dimension

The use of the adopted performance appraisal system for instructional and other employees.
 The accurate and timely filing of all school reports.
 The completion of required professional development services.

(Special Note)

An effective or higher rating is required in this job context category in order to be eligible for an overall Effective or higher rating.

Source Code (circle choices)

- | | | | | | |
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Rating Code (circle one)

Unsatisfactory
Needs Improvement
Effective
Very Effective
Outstanding

BUDGET DIRECTOR (Continued)

OVERALL RATING: (enter total scores)

Input from parents and teachers was collected and analyzed in preparation of this report.

Outstanding ____ Very Effective ____ Effective ____ Needs Improvement ____ Unsatisfactory ____

Comments of the Evaluatee:

This evaluation has been discussed with me: Yes ____ No ____

Signature of Evaluatee

Date

Comments of the Evaluator:

Signature of Evaluator

Date