**School Business Official Evaluation Tool**

**(School District)**

**Introduction**

*The following is a tool intended for use in evaluating the performance of the School Business Official.*

Suggested Process

* **Organizational Goals** - The SBO should have a working knowledge of the overarching organizational goals

and how management services relate to the mission of the organization.

* **Department Goals –** The SBO should work with each department to create short and long term goals in relation to the organizational goals.
* **Job Description –** A clear job description and job duty statement should be prepared in cooperation with the Supervisor. It should be reviewed and updated annually.
* **Self-Evaluation –** The SBO should spend some time before the formal evaluation meeting completing this evaluation form and prepare evidence to use in the formal evaluation.
* **Formal Evaluation with Superintendent**

Rating Categories

*SBOs will be rated according to eight overarching categories.*

* Leadership Skills
* Fiscal Management
* Accounting
* Financial Planning
* Reporting
* Budget Development and Monitoring
* Purchasing/Inventory Management
* Payroll
* Operations, Maintenance and Safety Risk Management
* Transportation
* School Nutrition
* Technology
* Human Resources
* Other duties as assigned
* Title I Director
* Self-Insurance Program

Levels of Performance

*An SBO’s performance will be rated according to four (4) levels: Highly Effective, Effective, Developing, or Ineffective.*

**4 = Highly Effective:** Performance

contributes significantly to the improvement of

the school district.

**3 = Effective:** Performance exemplifies what

could be reasonably expected of well-prepared

SBO.

**2 = Developing Effectiveness:** Although

performance is not inadequate, there is a need

for improvement in this area.

**1 = Ineffective:** Performance shows

deficiencies.

Leadership Skills

Levels of Performance

Ineffective – 1; Developing Effectiveness – 2; Effective – 3; Highly Effective – 4; Not Applicable – N/A

Maintains high standards of ethics, honesty and integrity in all personal and

professional matters. 1 2 3 4 N/A

Demonstrates the initiative and persistence needed to accomplish goals and

objectives. 1 2 3 4 N/A

Identifies problems, initiates solutions and monitors progress towards his/her

solutions. 1 2 3 4 N/A

Effectively manages time and devotes energy to discharging the responsibilities

of the position. 1 2 3 4 N/A

Shows openness to new ideas as to how the functioning of the district might

be improved. 1 2 3 4 N/A

Communicates in a clear, accurate and concise manner. 1 2 3 4 N/A

Accepts responsibility for decisions and actions, as well as for decisions and

actions of those who are directly responsible to the business official. 1 2 3 4 N/A

Actively engages in self-improvement and other professional development

activities. 1 2 3 4 N/A

Demonstrates an understanding of strategies for working effectively with the

district leader, building leaders, the Board of Education or other governing

entity, staff, parent/guardians, and community members to identify and

allocate resources for supporting the educational vision. 1 2 3 4 N/A

Demonstrates an understanding of strategies for building and maintaining

ongoing partnerships with district staff and other stakeholders at both the

local and state level. 1 2 3 4 N/A

**Leadership Skills Total**: \_\_\_\_\_\_

**Performance Level Average** (Total/10): \_\_\_\_\_

Reminder: if “not applicable” selected, reduce divided by number above.

***Levels of Performance Average Targets***

Highly Effective: 4.0; Effective: 3.0-3.9; Developing Effectiveness: 2.0-2.9; Ineffective: 1.0-1.9

Fiscal Management

Accounting Levels of Performance

Ineffective – 1; Developing Effectiveness – 2; Effective – 3; Highly Effective – 4; Not Applicable – N/A

Establishes and maintains accounting records and procedures to conform to

district policy, state and federal requirements, GAAP, and implements procedures

for encumbrance, expense accounting and distribution of revenues into

proper fund accounts. 1 2 3 4 N/A

Supervises and/or handles the maintenance of grants in order to file required

draws and reports to funding agencies. 1 2 3 4 N/A

Supervises and/or handles the collection of revenues by establishing

and monitoring procedures for district revenue collections and deposits

by assigned personnel. 1 2 3 4 N/A

Demonstrates an understanding of the impact and relationship between the

tax levy, assessment and equalization rates, and their impact on state aid. 1 2 3 4 N/A

Demonstrates knowledge of fund balance management and stabilization. 1 2 3 4 N/A

Demonstrates knowledge of financial statements, balance sheets, journal

entries and other accounting principles. 1 2 3 4 N/A

**Fiscal Management – Accounting Subtotal: \_\_\_\_\_**

**Performance Level Average** (Subtotal/6):\_\_\_\_\_\_

Reminder: if “not applicable” selected, reduce divided by number above.

***Levels of Performance Average Targets***

Highly Effective: 4.0; Effective: 3.0-3.9; Developing Effectiveness: 2.0-2.9; Ineffective: 1.0-1.9

Fiscal Management

Financial Planning Levels of Performance

Ineffective – 1; Developing Effectiveness – 2; Effective – 3; Highly Effective – 4; Not Applicable – N/A

Identifies and analyzes strategies for financing in the short- and long-term

while sustaining the district’s educational vision. 1 2 3 4 N/A

Demonstrates knowledge of procedures for developing, implementing,

monitoring, evaluating and updating the district strategic plan. 1 2 3 4 N/A

Demonstrates understanding of how to assess the district’s current financial

health and monitor status of district finances on an ongoing basis. 1 2 3 4 N/A

Develops and maintains monthly cash flow statements to aid in determining

cash available for investment and/or borrowing needs. 1 2 3 4 N/A

Determines best available investment instruments and obtains quotations on

interest rates considering investment amount, time of investment and

prevailing interest rates. 1 2 3 4 N/A

Determines sources of borrowing for cash flow and employs competitive

bidding to obtain best interest rates. 1 2 3 4 N/A

Establishes a debt service schedule to assure availability of funds to meet

debt service requirements. 1 2 3 4 N/A

Develops plans for long-term borrowing including the preparation of

repayment schedules, coordinates data for bond sale prospectus and arranging

for sale of bonds in cooperation with fiscal advisor and bond counsel. 1 2 3 4 N/A

Provides fiscal, statistical and business management information in support

of state and federal grant applications. 1 2 3 4 N/A

**Fiscal Management – Financial Planning Schedule: \_\_\_\_\_**

**Performance Level Average** (Subtotal/9): \_\_\_\_\_\_

Reminder: if “not applicable” selected, reduce divided by number above.

***Levels of Performance Average Targets***

Highly Effective: 4.0; Effective: 3.0-3.9; Developing Effectiveness: 2.0-2.9; Ineffective: 1.0-1.9

Fiscal Management

Reporting Levels of Performance

Ineffective – 1; Developing Effectiveness – 2; Effective – 3; Highly Effective – 4; Not Applicable – N/A

Secures and coordinates an independent annual audit of the school district’s

financial records. 1 2 3 4 N/A

Prepares annual financial statements in accordance with GAAP for external

uses (e.g. “Audit Report) 1 2 3 4 N/A

Supervises and/or handles preparation and transmittal of periodic financial

reports to appropriate federal and state authorities such as FID, MEGS+,

DEP filings, CMS, etc. 1 2 3 4 N/A

Prepares and interprets a variety of special reports at the request of the

Superintendent, Board, state and federal agencies. 1 2 3 4 N/A

Prepares and interprets financial transactions to prepare cost analysis reports

as requested by the Superintendent and other administrators. 1 2 3 4 N/A

**Fiscal Management – Reporting Subtotal: \_\_\_\_\_**

**Performance Level Average** (Subtotal/5): **\_\_\_\_\_**

Budget Development & Monitoring

Prepares and/or supervises the creation of the budget development process

and timeline for use by all district staff at the direction of the Superintendent. 1 2 3 4 N/A

Reviews and consolidates all budget requests and revenue sources to prepare

and develop the preliminary budget. 1 2 3 4 N/A

Assists the Superintendent in presenting the proposed budget to the Board

of Education and other groups as requested. 1 2 3 4 N/A

Establishes and maintains budgetary control through accounting and

financial report procedures. 1 2 3 4 N/A

Recommends budget amendments in a timely manner. 1 2 3 4 N/A

**Fiscal Management – Budget Development & Monitoring Subtotal: \_\_\_\_**

**Performance Level Average** (Subtotal/5): \_\_\_\_\_

Reminder: if “not applicable” selected, reduce divided by number above.

***Levels of Performance Average Targets***

Highly Effective: 4.0; Effective: 3.0-3.9; Developing Effectiveness: 2.0-2.9; Ineffective: 1.0-1.9

Fiscal Management

Purchasing/Inventory Management Levels of Performance

Ineffective – 1; Developing Effectiveness – 2; Effective – 3; Highly Effective – 4; Not Applicable – N/A

Demonstrates an understanding of legal requirements and procedures

associated with procurement, bidding, and vendor relationships and the use

of requisitions, purchase orders and invoices. 1 2 3 4 N/A

Develops and supervises and/or handles maintenance and control of

property classification and inventory systems for fixed assets and supplies. 1 2 3 4 N/A

Periodically audits insurance coverage against inventories, appraisals,

liabilities and replacement cost. 1 2 3 4 N/A

Monitors purchasing calendar to assure timely quoting, ordering

and delivery of goods and services and prompt closeout of orders. 1 2 3 4 N/A

Coordinates formal bidding or purchases through state contracts, sources

exempt from bidding law and those obtainable by direct purchase in

accordance with Board policy. 1 2 3 4 N/A

Facilitates other cooperative bidding procedures with MSBO, state

cooperatives and/or neighboring school districts to maximize value. 1 2 3 4 N/A

**Fiscal Management – Purchasing/Inventory Management Subtotal: \_\_\_\_\_**

**Performance Level Average** (Subtotal/6): \_\_\_\_\_\_

Payroll

Establishes and maintains payroll procedures and supervises and/or handles

payroll operations. 1 2 3 4 N/A

Applies knowledge of procedures for processing and managing payroll,

including legal requirements. 1 2 3 4 N/A

**Fiscal Management – Payroll Subtotal: \_\_\_\_\_**

**Performance Level Average** (Subtotal/2): \_\_\_\_\_\_

**Fiscal Management Total: \_\_\_\_\_**

**Performance Level Average** (Total/32): \_\_\_\_\_\_

***Levels of Performance Average Targets***

Highly Effective: 4.0; Effective: 3.0-3.9; Developing Effectiveness: 2.0-2.9; Ineffective: 1.0-1.9

Operations, Maintenance, Safety Risk Management and Capital Projects

Levels of Performance

Ineffective – 1; Developing Effectiveness – 2; Effective – 3; Highly Effective – 4; Not Applicable – N/A

Develops the district risk management program on the basis of evaluation of

exposures and make recommendations to the Superintendent and Board of

Education. 1 2 3 4 N/A

Demonstrates an understanding of procedures and practices for maintaining a

clean, safe learning environment (e.g. custodial and maintenance services,

OSHA, MIOSHA, federal and state regulations). 1 2 3 4 N/A

Reports on liability, real and personal property and other covered losses to

carrier and to the Superintendent. 1 2 3 4 N/A

Supervises and/or handles the preparation and maintenance of an equipment

replacement program. 1 2 3 4 N/A

Oversees the planning and implementation of a preventative maintenance

program for district equipment and building operational systems. 1 2 3 4 N/A

Supervises and/or handles bond issue and performance contract finances,

cash flow, communication with architect, direction of construction, scheduling

change orders, necessary purchases, and completion of required reports. 1 2 3 4 N/A

Identifies energy conservation measures to ensure acceptable levels of

Energy consumption and cost effectiveness. 1 2 3 4 N/A

Assists with planning, design and construction of capital projects. 1 2 3 4 N/A

**Operations, Maintenance, Safety Risk Management and Capital Projects Total: \_\_\_\_\_**

**Performance Level Average** (Total/8): \_\_\_\_\_

Reminder: if “not applicable” selected, reduce divided by number above.

***Levels of Performance Average Targets***

Highly Effective: 4.0; Effective: 3.0-3.9; Developing Effectiveness: 2.0-2.9; Ineffective: 1.0-1.9

Transportation

Levels of Performance

Ineffective – 1; Developing Effectiveness – 2; Effective – 3; Highly Effective – 4; Not Applicable – N/A

Collaborates with the Director of Transportation in the preparation of

policies, rules, regulations and procedures. 1 2 3 4 N/A

Directs the establishment and maintenance of a cost effective management

plan for equipment replacement (buses) and supplies. 1 2 3 4 N/A

Demonstrates knowledge of sage and efficient student transportation,

including statutory and regulatory requirements, efficient routing, schedule

development, training and oversight practices. 1 2 3 4 N/A

**Transportation Total: \_\_\_\_\_**

**Performance Level Average** (Total/3): \_\_\_\_\_

School Nutrition

Provides supervision and consultation to the Food Service Director. 1 2 3 4 N/A

Coordinates fiscal, management and reporting functions of food service

programs 1 2 3 4 N/A

Establishes and maintains cost analysis and control procedures needed to

operate the food service program. 1 2 3 4 N/A

**School Nutrition Total: \_\_\_\_\_**

**Performance Level Average** (Total/3): \_\_\_\_\_

Reminder: if “not applicable” selected, reduce divided by number above.

***Levels of Performance Average Targets***

Highly Effective: 4.0; Effective: 3.0-3.9; Developing Effectiveness: 2.0-2.9; Ineffective: 1.0-1.9

Technology

Levels of Performance

Ineffective – 1; Developing Effectiveness – 2; Effective – 3; Highly Effective – 4; Not Applicable – N/A

Demonstrates knowledge of procedures for directing the development,

implementation and maintenance of a district-wide information

management system. 1 2 3 4 N/A

Directs the implementation and tests a disaster recovery plan. 1 2 3 4 N/A

Displays knowledge of computer and information technology security and

licensing. 1 2 3 4 N/A

**Technology Total: \_\_\_\_\_**

**Performance Level Average** (Total/3): \_\_\_\_\_

Human Resources

Demonstrates knowledge of legal requirements associated with human

resources administration. 1 2 3 4 N/A

Demonstrates an understanding of processes for engaging in and supporting

district wide succession planning, including recruiting, retraining, identifying

and coaching potential leaders. 1 2 3 4 N/A

Demonstrates knowledge of issues and procedures in administering employee

records. 1 2 3 4 N/A

Applies knowledge of legal requirements associated with collective

bargaining process and develops data to support negotiations. 1 2 3 4 N/A

**Human Resources Total: \_\_\_\_\_**

**Performance Level Average** (Total/4): \_\_\_\_\_

Reminder: if “not applicable” selected, reduce divided by number above

***Levels of Performance Average Targets***

Highly Effective: 4.0; Effective: 3.0-3.9; Developing Effectiveness: 2.0-2.9; Ineffective: 1.0-1.9

Other Duties

Levels of Performance

Ineffective – 1; Developing Effectiveness – 2; Effective – 3; Highly Effective – 4; Not Applicable – N/A

Demonstrates knowledge of all aspects of Titles I, II and IV, including MEGS+

application process, educational purposes, staffing, program evaluation, and

resource administration. 1 2 3 4 N/A

Oversees and monitors the district self-insurance plans, including establishment

of annual reinsurance limits, accrual-based self-insurance fund accounting,

annual “true up” procedures, illustrated rate calculations, etc. 1 2 3 4 N/A

**Other Duties Total: \_\_\_\_\_**

**Performance Level Average** (Total/2): \_\_\_\_\_

Reminder: if “not applicable” selected, reduce divided by number above

***Levels of Performance Average Targets***

Highly Effective: 4.0; Effective: 3.0-3.9; Developing Effectiveness: 2.0-2.9; Ineffective: 1.0-1.9

**Performance Level Totals**

**Leadership Skills Total: \_\_\_\_\_**

**Fiscal Management Total: \_\_\_\_\_**

**Operations, Maintenance, Safety Risk Mgmt, Capital Project Total: \_\_\_\_\_**

**Transportation Total: \_\_\_\_\_**

**School Nutrition Total: \_\_\_\_\_**

**Technology Total: \_\_\_\_\_**

**Human Resources Total: \_\_\_\_\_**

**Other Duties Total: \_\_\_\_\_**

**Evaluation Total: \_\_\_\_\_**

**Evaluations Average (Total/\_\_\_): \_\_\_\_\_**

Comments/Goals

Reviewer Comments/Narrative:

Jointly Established Goals for Continuous Improvement:

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Reviewer: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Employee: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Signed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_