

**BUSINESS MANAGER EVALUATION**

**(NOTE: Brackets indicate optional items—check the business manager’s job description before including)**

Instructions: Each board member should complete this evaluation and return it to the board president. The board president should compile a master copy of the evaluation. Ensure that the master copy clearly identifies how each board member voted and includes all comments from the individual evaluations. The board should meet to discuss and approve the evaluation, voting on the final rating for each performance area listed below. There are not statutory deadlines for completing the business manager evaluation.

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| **Name of board member completing evaluation: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** | | | | | |
| **Performance Area** | **Coordinate Board Meetings** | | | | |
| **Indicators** | Advise on financial and budgetary matters before the board | | | | |
| Attend meetings as assigned by board or requested by superintendent | | | | |
| **[Notify board of meetings]** | | | | |
| Prepare board packets and provide appropriate information to supplement agenda items (NOTE: This duty may be shared by the business manager and superintendent) | | | | |
| **[Provide notice of all meetings of the board including committee meetings and public hearings]** | | | | |
| Record and prepare the minutes of all meetings at which required to attend; present minutes for board approval; disseminate minutes to newspaper if required | | | | |
| **Comments** |  | | | | |
| **Ratings** | **Needs Improvement**  **🞏\_\_\_\_\_\_\_\_\_ initials** | **Satisfactory**  **🞏\_\_\_\_\_\_\_\_\_ initials** | | | **Exceeds Expectations**  **🞏\_\_\_\_\_\_\_\_\_ initials** |
| **Performance Area** | **Oversee District Finances** | | | | |
|  | Advise on financial and budgetary matters before the board | | | | |
|  | Assure that the district receives optimal fiscal entitlement from county, state, and federal resources | | | | |
| **Indicators** | Comply with internal audit procedures, schedule external audit, and respond to audit recommendations | | | | |
| Cosign and disseminate all operating fund checks and contracts requiring signatures | | | | |
| Establish procedures for, and comply with, financial record keeping and security of such records | | | | |
| Issue payment for all board-approved expenditures | | | | |
| Maintain accurate records of all funds as required by law and all receipts and disbursements | | | | |
| Maintain bond and note register | | | | |
| Maintain petty cash | | | | |
| Oversees district procurement process, ensuring appropriate checks and balances, and assist board with purchases requiring formal bidding | | | | |
| Oversee accounts payable and accounts receivable | | | | |
| Prepare and deposit all district funds following banking procedures | | | | |
| Prepare, distribute, and file all reports and contracts requiring business manager signature and/or assigned to business manager by the board | | | | |
| Produce all district financial records when directed to do so by the board | | | | |
| Provide financial information to board/superintendent for budget preparation and file the budget and mill levy certification; manage district budget throughout fiscal year | | | | |
| Receive, manage, and maintain custody of all moneys for which the district or the board is responsible, including, but not limited to, overseeing investments | | | | |
| Report the following monthly to the board: fund balance sheets, revenues, expenditures, and check registers | | | | |
| **Comments** |  | | | | |
| **Ratings** | **Needs Improvement**  **🞏\_\_\_\_\_\_\_\_\_ initials** | **Satisfactory**  **🞏\_\_\_\_\_\_\_\_\_ initials** | | | **Exceeds Expectations**  **🞏\_\_\_\_\_\_\_\_\_ initials** |
| **Performance Area** | **Perform Risk Management Functions** | | | | |
| **Indicators** | **[Call for bids or negotiate insuring agencies]** | | | | |
| **[Determine insurable values of building and contents]** | | | | |
| File loss claims and accident reports | | | | |
| Maintain inventory of district equipment; update as needed | | | | |
| **[Recommend insurance policies for casualty, liability, fidelity and school indemnity]** | | | | |
| **[Respond to claims against the school]** | | | | |
| **Comments** |  | | | | |
| **Ratings** | **Needs Improvement**  **🞏\_\_\_\_\_\_\_\_\_ initials** | **Satisfactory**  **🞏\_\_\_\_\_\_\_\_\_ initials** | | | **Exceeds Expectations**  **🞏\_\_\_\_\_\_\_\_\_ initials** |
| **Performance Area** | **Perform Personnel Management Duties** | | | | |
|  | **[Administer all employee benefits policies/programs and make recommendations to board regarding changes to these policies/programs]** | | | | |
| **Indicators** | **[Maintain permanent records of district employees and maintain personnel files following record retention guidelines]** | | | | |
| **[Maintain records of all personnel** | | | | |
| **[Process unemployment claims and payments]** | | | | |
| **[Provide information on working conditions, benefits, policy and procedures as requested]** | | | | |
| **[Prepare, process, and disseminate payroll]** | | | | |
| Provide resource data for negotiations | | | | |
| **[Provide in-service training on benefits to employees]** | | | | |
| **[Process Workforce Safety and Insurance (WSI) claims and payments]** | | | | |
| **[Supervise business office clerical, accounting, or other staff as assigned]** | | | | |
| **Comments** |  | | | | |
| **Ratings** | **Needs Improvement**  **🞏\_\_\_\_\_\_\_\_\_ initials** | **Satisfactory**  **🞏\_\_\_\_\_\_\_\_\_ initials** | | | **Exceeds Expectations**  **🞏\_\_\_\_\_\_\_\_\_ initials** |
| **Performance Area** | **Oversee District Elections** | | | | |
| **Indicators** | Supervise, organize and coordinate all school elections in accordance with law | | | | |
| **[Provide financial information for levy and bond elections] (NOTE: Only applies when holding a levy increase or bond election]** | | | | |
| **Comments** |  | | | | |
| **Ratings** | **Needs Improvement**  **🞏\_\_\_\_\_\_\_\_\_ initials** | | **Satisfactory**  **🞏\_\_\_\_\_\_\_\_\_ initials** | **Exceeds Expectations**  **🞏\_\_\_\_\_\_\_\_\_ initials** | |
| **Performance Area** | **Perform Other Assigned Duties** | | | | |
| **Indicators** | Comply with district policies applicable to his/her position | | | | |
| **[Compute district enrollment projections]** | | | | |
| **[Maintains record on open enrollments, out-of-district students, and tuitioned students]** | | | | |
| Perform all duties required by law | | | | |
| Performs other duties as assigned | | | | |
| Supervises district administrative computer operations (financial, personnel, inventory, etc. | | | | |
| **Comments** |  | | | | |
| **Ratings** | **Needs Improvement**  **🞏\_\_\_\_\_\_\_\_\_ initials** | **Satisfactory**  **🞏\_\_\_\_\_\_\_\_\_ initials** | | | **Exceeds Expectations**  **🞏\_\_\_\_\_\_\_\_\_ initials** |
| **Performance Area** | **Demonstrate Professional Competencies** | | | | |
|  | Demonstrate professionalism and courtesy in dealings with board members, district employees, students, and patrons | | | | |
| Demonstrate accountability and honesty in execution of all duties | | | | |
|  | Keep abreast of financial and business trends, including participating in professional development opportunities | | | | |
| **Comments** |  | | | | |
| **Ratings** | **Needs Improvement**  **🞏\_\_\_\_\_\_\_\_\_ initials** | **Satisfactory**  **🞏\_\_\_\_\_\_\_\_\_ initials** | | | **Exceeds Expectations**  **🞏\_\_\_\_\_\_\_\_\_ initials** |
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**This section should only be completed when board meets to finalize evaluation**

| **Performance Area** | **Record of Roll Call Vote** | | **Final Rating (based on majority)** |
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| **Coordinate Board Meetings** | **Board Member Name** | **Rating** |  |
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| **Overseeing District Finances** | **Board Member Name** | **Rating** |  |
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| **Perform Risk Management Functions** | **Board Member Name** | **Rating** |  |
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| **Perform Personnel Management Duties** | **Board Member Name** | **Rating** |  |
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| **Oversee District Elections** | **Board Member Name** | **Rating** |  |
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| **Perform Other Assigned Duties** | **Board Member Name** | **Rating** |  |
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| **Demonstrate Professional Competencies** | **Board Member Name** | **Rating** |  |
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| **Board goals for business manager:** |  | | |

**Date approved by board: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**