

**BUSINESS MANAGER - EVALUATION INSTRUMENT**

EVALUATION OF \_\_\_\_\_ DATE \_\_\_\_\_

**KEY:**

- 4 - Commendable  
- Exceeds normal standards  
- A real strength  
- Almost always true
- 3 - Satisfactory  
- Acceptable  
- Meets standards  
- True most of the time
- 2 - Needs improvement to meet standards  
- Seldom true
- 1 - Unsatisfactory and fails to meet standards  
- Almost never true
- 0 - Insufficient knowledge on which to evaluate  
- Non-applicable

**I. MANAGEMENT TECHNIQUES**

**Evaluates financial status and keeps superintendent and school board apprised in a timely manner.**

- \_\_\_\_ A. Collects monies, determines that funds are spent legally, and controls and maintains accounting procedures as appropriate.
- \_\_\_\_ B. Adheres to state and district guidelines and procedures governing expenditures of funds for goods and services.
- \_\_\_\_ C. Identifies and documents budget needs by providing realistic estimates of financial requirements.
- \_\_\_\_ D. Fulfills specified responsibilities in formulating the district-wide budget.
- \_\_\_\_ E. Takes an active role in development of salary schedules for all personnel.

COMMENTS:

RECOMMENDATIONS with timeline for improvement:

**II. STAFF RELATIONS**

**Develops and maintains strong, effective, and positive relationships with total staff.**

\_\_\_\_A. Provides personnel with appropriate information regarding benefits and hours according to their positions within the school.

\_\_\_\_B. Maintains updated personnel records on file at the school. Advises personnel when updated information is required.

COMMENTS:

RECOMMENDATIONS with timeline for improvement:

**III. BOARD RELATIONSHIPS**

**Establishes a positive, effective working relationship with the school board.**

\_\_\_\_ A. Keeps the school board informed on financial issues, needs, and operations of the school system.

\_\_\_\_ B. Provides financial statements and reports to the board on a timely basis

\_\_\_\_ C. Submits policy information to ASBA for Policy Bridge inclusion upon request from the board.

\_\_\_\_D. Submits school financial reports/updates to the school website as appropriate

COMMENTS\_:

RECOMMENDATIONS with timeline for improvement:

RECOMMENDATIONS with timeline for improvement:

**IV. PROFESSIONAL DEVELOPMENT**  
**Improves professional skills and knowledge**

\_\_\_\_\_ Seeks and continues professional development through reading, coursework, conference attendance, and interaction with business managers from other districts. Develops, uses, and evaluates effective approaches to improve job performance.

COMMENTS:

RECOMMENDATIONS with timeline for improvement:

**EMPLOYMENT RECOMMENDATION**

- \_\_\_\_\_ A. Recommended for continued employment.
- \_\_\_\_\_ B. Recommended for continued employment with qualifications.
- \_\_\_\_\_ C. Not recommended for employment.

COMMENTS:

Signature does not indicate agreement with the evaluation, but does verify receipt of the report.

Signed \_\_\_\_\_ date \_\_\_\_\_ Signed \_\_\_\_\_ date \_\_\_\_\_  
School Board President Business Manager

Signed \_\_\_\_\_ date \_\_\_\_\_  
Superintendent

One copy of this form shall be kept on file for every evaluation period. The job description of the business manager should be considered during the evaluation process. Comments discussing the reasons for the rating shall be given in writing.