

REACH DANE REACH GREEN HEAD START

SUPERVISORY EVALUATION FORM

CHIEF FINANCIAL OFFICER

Employee _____ Date _____

Type of Rating: Annual _____ Introductory _____

Performance Definitions

- **Meets Expectations** – Performance consistently exceeds professional standards and objective of the position. Performance of a job function is completed in an exceptional fashion. This rating is reserved for those individuals whose distinguished performance is obvious to all.
- **Needs Improvement** – Performance generally meets standards of the job functions but sometimes falls below acceptable standards. The employee has demonstrated ability to correct deficiencies. The need for further development is recognized. Comments are required for this rating. Identify goals and improvements.
- **Unsatisfactory** - Performance is clearly and consistently inadequate or below professional standards. Comments are required for this rating. Identify goals and improvements. (Should be on a PIP or disciplinary action must be in place).

General Work Habits

| | | | |
|--|----|----|---|
| Arrives on time. | ME | NI | U |
| Reliable in attendance. | ME | NI | U |
| Alert in health and safety matters. | ME | NI | U |
| Flexible with assignments and schedule. | ME | NI | U |
| Comes to work with a positive attitude | ME | NI | U |
| Gives direct supervisor ample notice for absences. | ME | NI | U |
| Remains calm in a tense situation. | ME | NI | U |

Comments:

Key Performance Factors from Job Description

Financial Management and Fiscal Stabilization

| | | | |
|--|----|----|---|
| Develops and manages short and long range fiscal plans and goals. | ME | NI | U |
| Coordinates the development of operational and capital expenditure budgets. | ME | NI | U |
| Manages agency accounts. | ME | NI | U |
| Monitors revenues, expenditures and budget compliance. | ME | NI | U |
| Observes early signs of changing financial conditions and responds effectively. | ME | NI | U |
| Controls costs and maximizes the use of assets. Identifies and implements cost reduction measures without detracting from service, operational or quality level. | ME | NI | U |
| Oversee risk management efforts. | ME | NI | U |
| Participates in contract negotiations. | ME | NI | U |
| Disburses payment and approves contracted services. | ME | NI | U |
| Develops and oversees all fiscal contracts and grants. | ME | NI | U |
| Interprets and implements all related laws, rules, regulations, and policies. | ME | NI | U |

Comments:

Financial Operations Management

| | | | |
|---|----|----|---|
| Develops and enforces fiscal policies and procedures. | ME | NI | U |
| Provides oversight for the maintenance of the general ledger, preparation of payroll, processing of accounts payable and accounts receivable. | ME | NI | U |
| Ensures that generally accepted accounting practices are followed. | ME | NI | U |
| Maintains adequate internal controls. | ME | NI | U |
| Oversees the preparation of year end reports. | ME | NI | U |
| Provides financial guidance to Fiscal staff on a regularly scheduled basis. | ME | NI | U |

Comments:

Financial Analysis Oversight

| | | | |
|---|----|----|---|
| Facilitates agency decision making by presenting financial analysis and recommendations; assessing options in relation to agency goals. | ME | NI | U |
| Prepares financial statements and reports for management. | ME | NI | U |
| Oversees all federal, state and local grants. | ME | NI | U |
| Presents information to the Board of Directors. | ME | NI | U |
| Evaluates financial aspects of childcare operations and makes recommendations. | ME | NI | U |
| Provides liaison and information for annual audits. | ME | NI | U |

Comments:

Organizational Strategic Planning Responsibilities

| | | | |
|---|----|----|---|
| Assists in enhancing organizational effectiveness through identification and analysis of current circumstances and recommends organizational systems and strategic initiatives and implements interventions and corrective action measures. | ME | NI | U |
|---|----|----|---|

Comments:

Outstanding Acknowledgements:

Goals or improvements sought for next evaluation:

Agreed upon action plan to meet goals:

1.

2.

3.

Employee _____ **Supervisor** _____

Date _____

If end of Introductory/New Hire Period indicate recommendation below:

☐ **Passed Introductory/New Hire Period**

☐ **Extend Introductory/New Hire Period by ____ days**

☐ **Discontinue employment with Reach Dane**