

Galion City Schools Executive Performance System - Treasurer

STEP 1: IDENTIFY ANNUAL DISTRICT OBJECTIVES

Name: Academic Year:

Position: Date of Meeting:

FOCUSED, ANNUAL DISTRICT OBJECTIVES (no more than three)	EVIDENCE OF PROGRESS OR COMPLETION (Monitoring Evidence/Data Sources)	TARGETED COMPLETION DATE
1.		
2.		
3.		
CAPACITY CONSIDERATIONS (e.g., financial resources, staff, equipment, time)		

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STEP 2: Summative & Formative Check-Ins

Name:

Academic Year:  
Date of Formative Check-In:  
Date of Summative Check-In:

STANDARD 1:  Leadership  The Treasurer: <ul style="list-style-type: none"><li>1.1 Participate as an integral member of the district leadership team.</li><li>1.2 Work with the district superintendent and board of education, with input from other stakeholders, to review, develop, align and implement policies and procedures.</li><li>1.3 Participate with the district superintendent and the board of education in the development and implementation of the district strategic plan.</li><li>1.4 Establish and manage sound fiscal practices to support the educational process.</li><li>1.5 Lead and manage personnel under direct supervision of the treasurer. 1.6 Support the effective use of data.</li></ul>	EMPLOYEE REFLECTION AND COMMENTS		BOARD RESPONSE/ RECOMMENDATIONS	
	FORMATIVE (MID-YEAR)		FORMATIVE (MID-YEAR)	
	SUMMATIVE (END-OF-YEAR)		SUMMATIVE (END-OF-YEAR)	

STANDARD 2:  Financial Management	EMPLOYEE REFLECTION AND COMMENTS	BOARD RESPONSE/ RECOMMENDATIONS
	FORMATIVE (MID-YEAR)	FORMATIVE (MID-YEAR)
<b>The Treasurer:</b> <ul style="list-style-type: none"> <li>2.1 Collect, analyze and interpret financial data for budgeting, forecasting and decision-making.</li> <li>2.2 Effectively manage district financial accounts including cash, budgetary, debt service, revenue and grant management.</li> <li>2.3 Demonstrate knowledge, performance and accuracy of standard accounting practices, auditing procedures and accurate financial reporting.</li> <li>2.4 Demonstrate knowledge of and compliance with state and federal laws.</li> </ul>		
	SUMMATIVE (END-OF-YEAR)	SUMMATIVE (END-OF-YEAR)
STANDARD 3:  Facilities, Property and Capital Asset Management		
	SUMMATIVE (END-OF-YEAR)	SUMMATIVE (END-OF-YEAR)
<b>The Treasurer:</b> <ul style="list-style-type: none"> <li>3.1 Acquire and maintain building and capital assets.</li> <li>3.2 Secure financing for capital projects.</li> <li>3.3 Develop and monitor risk management practices to protect capital assets.</li> <li>3.4 Provide financial oversight and analysis of fiscal implications to the district support services.</li> </ul>		

STANDARD 4:  Communication and Collaboration  The Treasurer: <ul style="list-style-type: none"> <li>4.1 Demonstrate competence in the communication of financial reports to all stakeholders.</li> <li>4.2 Communicate effectively and openly while demonstrating a willingness to collaborate with internal stakeholders.</li> <li>4.3 Communicate effectively and openly while demonstrating a willingness to collaborate with external stakeholders.</li> </ul>	EMPLOYEE REFLECTION AND COMMENTS	BOARD RESPONSE/ RECOMMENDATIONS
	FORMATIVE (MID-YEAR)	FORMATIVE (MID-YEAR)
STANDARD 5:  Professionalism  The Treasurer: <ul style="list-style-type: none"> <li>5.1 Understand, uphold and comply with professional ethics, including the Licensure Code of Professional Conduct for Ohio Educators (LCPCOE) and the Ohio Ethics Laws</li> <li>5.2 Model and expect fairness, honesty and consistency in the performance of duties.</li> <li>5.3 Maintain compliance with applicable local, state and federal laws, rules and regulations and district policies and procedures.</li> <li>5.4 Maintain a strong commitment to professional development.</li> <li>5.5 Collaborate with peers for the advancement of the profession.</li> </ul>	SUMMATIVE (END-OF-YEAR)	SUMMATIVE (END-OF-YEAR)

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STEP 3: Performance on Objectives

Name:

Academic Year:

Date of Formative Check-In:

Date of Summative Check-In:

DISTRICT OBJECTIVES (from Step 1)	EVIDENCE OF PROGRESS	FORMATIVE ASSESSMENT		SUMMATIVE ASSESSMENT	
		IN PROGRESS	COMPLETED	IN PROGRESS	COMPLETED
Employee Response:					
Board Commendations/Recommendations:					

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STEP 4: Annual Summative Evaluation

Name:	Academic Year:
Position:	Date of Formative Check-In:
	Date of Summative Check-In:

Board Commendations/Recommendations:

Signature of Board President:	Printed Name of Board President:	Date:
Signature of Employee:	Printed Name of Employee:	Date: