

**TRI-COUNTY SPECIAL EDUCATION JOINT AGREEMENT (TCSE)  
Chief School Business Official (CSBO) Performance Evaluation Form**

**Employee Name:** \_\_\_\_\_

---

TIMELINE OF DOCUMENTATION FOR LAST SUPERVISION CYCLE

Last formal summative evaluation date: \_\_\_\_\_ Last post-evaluation conference date: \_\_\_\_\_

Notice of current evaluation date: \_\_\_\_\_ Pre-Evaluation conference date: \_\_\_\_\_  
*(Prior to 1<sup>st</sup> day of school)*

Informal Observation dates: \_\_\_\_\_

This formal summative evaluation date: \_\_\_\_\_ This post-evaluation conference date: \_\_\_\_\_

---

NOTE: The employee should be rated on every item using the rating scale below. Ratings should be based on observations or professional knowledge of the employee's behavior or skill.

**RATING SCALE DEFINITIONS:**

**EXCELLENT:** Documented observations reveal performance of a commendable quality. (Multiple strengths in many skills areas noted in the criteria/standards. The employee impacts positively upon students and the school environment.)

**PROFICIENT:** Documented observations reveal general acceptable levels of performance. Job requirements are expedited adequately.

**NEEDS IMPROVEMENT:** Documented observations reveal inconsistent performance in areas noted in the criteria/standards and results in less than quality work performance. The employee requires support by an administrator in meeting the criteria/standards. Areas of professional improvement will be jointly identified and planned between the Educator and Evaluator. (Identified weaknesses may be improved by the Clinical Director or by implementation of a Professional Growth Plan.)

**UNSATISFACTORY:** Documented observations reveal significant weaknesses in areas noted in the criteria/standards and require direct intervention by an administrator. Continued performance at a level below expectations would have a negative impact upon students and upon the school environment. (A summative rating of unsatisfactory would be cause for the implementation of a formal Remediation Plan for tenured staff).

**TRI-COUNTY SPECIAL EDUCATION JOINT AGREEMENT (TCSE)  
Chief School Business Official (CSBO) Performance Evaluation Form**

<b>PROFESSIONALLY RELATED AREAS:</b>		<b>E</b>	<b>P</b>	<b>NI</b>	<b>U</b>
1.	Takes part in professional development activities (May include coursework, In- service activities, conferences, review of professional literature, workshops, etc.).				
Comments:					
		<b>E</b>	<b>P</b>	<b>NI</b>	<b>U</b>
2.	Maintains confidentiality (conversations with staff/dissemination of records).				
Comments:					
		<b>E</b>	<b>P</b>	<b>NI</b>	<b>U</b>
3.	Performs necessary clerical responsibilities in a timely and complete manner (establish timelines, dictation and proof reading of reports, etc.).				
Comments:					
		<b>E</b>	<b>P</b>	<b>NI</b>	<b>U</b>
4.	Is in attendance and prompt. (number of days absent in evaluation period) Contacts supervisor in a timely manner when necessary to be absent, enters absences in SDS.				
Comments:					
		<b>E</b>	<b>P</b>	<b>NI</b>	<b>U</b>
5.	Manages time and resources effectively. Maintains mutually agreed upon timelines in completion of evaluations and reports.				
Comments:					
		<b>E</b>	<b>P</b>	<b>NI</b>	<b>U</b>
6.	Effectively communicates with TCSE staff/administrators/board/district staff/other.				
Comments:					
		<b>E</b>	<b>P</b>	<b>NI</b>	<b>U</b>
7.	Adheres to state/federal regulations, board policies/procedures, information as presented in the employee handbook, contract, etc.				
Comments:					

**TRI-COUNTY SPECIAL EDUCATION JOINT AGREEMENT (TCSE)  
Chief School Business Official (CSBO) Performance Evaluation Form**

		E	P	NI	U
8.	Establishes and maintains a reputation of respect with the key stakeholders of TCSE.				
Comments:					
		E	P	NI	U
9.	Maintains appropriate relationships/cooperates/collaborates with TCSE and district colleagues as well as supervisor.				
Comments:					
		E	P	NI	U
10.	Accepts evaluation, redirection, and change in a positive and professional manner. Makes necessary changes as recommended by supervisor in a timely manner.				
Comments:					
		E	P	NI	U
11.	Maintains positive relationships with staff. Broadly shares responsibility/accountability with others based on their skills, experience and time available. Clarifies roles.				
Comments:					
		E	P	NI	U
12.	Writes clearly, concisely and persuasively. Speaks in a clear and articulate manner, adapting content and style to different audiences and venues.				
Comments:					
		E	P	NI	U
13.	Appeals to emotion and/or reason using data, concrete examples and demonstrations when talking with Executive Board members.				
Comments:					
		E	P	NI	U
14.	Effectively prepares for Executive Board meetings, including setting clear objectives, agendas, advance materials and appropriate time management. Provides opportunities for input.				
Comments:					

**TRI-COUNTY SPECIAL EDUCATION JOINT AGREEMENT (TCSE)  
Chief School Business Official (CSBO) Performance Evaluation Form**

		E	P	NI	U
15.	Understands his/her strengths and weaknesses and circumstances in which they become most important.				
Comments:					
		E	P	NI	U
16.	Actively seeks constructive feedback and other opportunities for self-development. Takes responsibility for his/her own behavior, mistakes and results and learns from successes and failures.				
Comments:					
		E	P	NI	U
17.	Models appropriate responses to conflict, encouraging others to manage conflict openly and productively. Settles disputes fairly.				
Comments:					
		E	P	NI	U
18.	Effectively manages change by setting new direction, seeking to understand the effects of change on the coop and stakeholders.				
Comments:					
ROLE COMPETENCY:		E	P	NI	U
1.	Prepares the budget, presentation and justification to the Executive Board.				
Comments:					
		E	P	NI	U
2.	Prepares enrollment and long-range plans to meet the student and financial needs of the coop. This may include multi-year projections of revenues and expenses and the feasibility of long-term funding for special projects and instructional improvement.				
Comments:					

**TRI-COUNTY SPECIAL EDUCATION JOINT AGREEMENT (TCSE)  
Chief School Business Official (CSBO) Performance Evaluation Form**

		E	P	NI	U
3.	Oversees the preparation of claims for state and federal categorical programs. Oversees implementation of grants.				
Comments:					
		E	P	NI	U
4.	Performs functions related to accounting and reporting, which may include but is not limited to bills payable, transfer of funds and management of activity funds.				
Comments:					
		E	P	NI	U
5.	Manages banking relationships and ensures appropriate and effective investment of coop funds.				
Comments:					
		E	P	NI	U
6.	Files a financial report annually for audit and implements audit suggestions on a timely basis.				
Comments:					
		E	P	NI	U
7.	Coordinates and oversees the purchase, maintenance and inventory of all supplies, including purchase by competitive bidding and management of contracts as directed by the Illinois School Code and Board Policy.				
Comments:					
		E	P	NI	U
8.	Supervises the staff accounting, payroll benefits and all related data in the area of personnel administration.				
Comments:					

**TRI-COUNTY SPECIAL EDUCATION JOINT AGREEMENT (TCSE)  
Chief School Business Official (CSBO) Performance Evaluation Form**

		E	P	NI	U
9.	Prepares pertinent fiscal data for negotiations, including data related to benefit programs.				
Comments:					
		E	P	NI	U
10.	Oversees the operation of the total school business services program including day-to-day district finance and business operations, recruitment and evaluation of staff.				
Comments:					
		E	P	NI	U
11.	Represents the coop's interests in all insurance and risk management programs.				
Comments:					
		E	P	NI	U
12.	Oversees the preparation of claims for state and federal categorical programs. Oversees implementation of grants.				
Comments:					
		E	P	NI	U
13.	Participates in decision-making process and selection of professional services. Works with architects and contractors to ensure desired project results in construction and remodeling of facilities and understands and carries out the legal responsibilities of the district.				
Comments:					
		E	P	NI	U
14.	Oversees all operations and contracts. Applies State and Federal guidelines for free/reduced meal subsidies. Takes part with regulatory agencies in the planning and reporting of food service program.				
Comments:					

**TRI-COUNTY SPECIAL EDUCATION JOINT AGREEMENT (TCSE)  
Chief School Business Official (CSBO) Performance Evaluation Form**

		E	P	NI	U
15.	Develops and implements a process for assessing potential safety hazards. Assists in the preparation of a district disaster preparedness and recovery plan.				
Comments:					
		E	P	NI	U
16.	Acts as advisor to the Director concerning financial affairs and matters of general importance to the educational program. Participates in decision-making and policy development.				
Comments:					
		E	P	NI	U
17.	Sets goals and participates in activities to maintain knowledge and skills and stay abreast of school finance related issues.				
Comments:					



**TRI-COUNTY SPECIAL EDUCATION JOINT AGREEMENT (TCSE)  
Chief School Business Official (CSBO) Performance Evaluation Form**

PERCEIVED AREAS OF STRENGTH:

---

PERCEIVED AREAS IN NEED OF IMPROVEMENT:

---

RECOMMENDATIONS, PROFESSIONAL DEVELOPMENT REQUIREMENTS, AND/OR GENERAL COMMENTS

---

**OVERALL PERFORMANCE RATING:** \_\_\_\_\_

*An employee signature acknowledges receipt and review of the evaluation with the appropriate supervisor. The employee signature does not necessarily acknowledge agreement with the evaluation. It is understood that the employee or administration may attach an additional statement to this evaluation if desired.*

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Supervisor Signature

\_\_\_\_\_  
Date