



Employee Performance Evaluation

(For use with Executive Director)

Employee Name: _____

Job Title: Executive Director

Reviewer: _____ **Review Date:** _____

The Executive Director will generally have at least one annual performance evaluation, although Samueli Academy Board (“Board”) reserves the right to hold such evaluations more or less frequently. Normally, the Governance Committee of the Board, or a subset thereof, will solicit and develop evaluation submissions from itself, the employee’s peer staff members, select others with knowledge of the employee’s performance, a self-evaluation, and intermittent observation. A representative or representatives may meet with the employee to discuss its initial determinations and the employee’s own perspective. Ultimately, an evaluation will be presented to the Board for review, further discussion, and approval as the evaluation. Once approved, the evaluation will be reviewed with the employee.

The expectation is that the employee and/or the Board/Governance Committee will have set goals for such employee for each year. Generally, the performance evaluation will, in part, reflect upon the employee’s success in achieving performance of such annual goals, as well as the employee’s overall performance including with respect to the metrics identified below.

In rating the employee, the expectation is that an employee merely performing the functions of his or her duties will receive a “Satisfactory” rating. A rating above or below “Satisfactory” requires superior or inferior performance rather than merely doing one’s job.

KEY TO RATINGS

EXCELLENT –

Individual performed all tasks in an exceptional manner and exceeded expectations in performance of duties through innovation, taking the initiative, vision, and execution.

GOOD –

Individual performs many tasks well, and all other tasks adequately. Employee has at least met all expectations and exceeded expectations in some areas.

SATISFACTORY -

Individual performs all tasks satisfactorily. Meets expectations.

FAIR –

Individual performs most tasks satisfactorily, but not all. Meets expectations in parts of job performance, but there are areas where improvement is needed.

UNSATISFACTORY –

Individual fails to perform many tasks well. Fails to meet overall expectations.

1. **Job Knowledge and Performance:** Level to which employee understands and performs job responsibilities and duties.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

2. **Job Productivity:** Level to which employee is productive in performing job responsibilities and expectations/needs of the Board.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

3. **Job Dependability:** Level to which employee is dependable in performing job responsibilities and expectations/needs of the Board.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

4. **Strategy Formation and Implementation:** Level to which employee has developed and implemented a sound strategic plan and translated it into effective work plans for self and staff.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

5. **Goal Setting and Achievement:** Level to which employee has participated with the Board in setting realistic but challenging goals designed to maintain and improve both Samueli Academy and self.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

6. **Financial Management:** Level to which employee effectively directed formulation of an annual budget and ensured that the approved budget was attained and assisted in managing operating budget for the year.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

7. **Staff Talent and Human Resources:** Level to which employee has effectively worked with and supervised the Director of Human Resources, overseen human resource policies, assisted in selecting, training and supervision of the Samueli Academy staff, assisted the CFO in establishing salary and benefit programs, and effectively assisted in setting employee goals to meet Samueli Academy’s needs now and in the foreseeable future.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

8. **Board Relations:** Level to which employee has kept the Board informed about important issues, obtained appropriate approval and input from the Board where necessary, attended Board meetings as necessary, utilized Board member talents in the community, worked effectively to assist the Board achieve its goals and tasks, and assisted the Board achieve its own accountability and level of responsibility.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

9. **Internal Capabilities:** Level to which employee has helped develop the office and staff environment, technology, equipment, facilities, systems, policies, and procedures that Samueli Academy needs to be effective, including effectively carrying out responsibility for overall supervision of the school and residential program.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

10. **External Relations:** Level to which employee has successfully built and cultivated relations with governments, donors, advisers, grantees, prospects, educational organizations, businesses, social groups and philanthropic organizations that are beneficial to Samueli Academy’s mission, educational purpose and financial goals and otherwise effectively represented the Board and Samueli Academy in interactions with parents, other citizens, and community and regulatory agencies.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

11. **Fundraising Development:** Level to which employee has effectively contributed to fundraising development by successfully helping to obtain donors, grantees, prospects, and philanthropic organizations to meet Samueli Academy’s fundraising and financial goals and has otherwise provided effective direction and oversight to achieve Samueli Academy’s operational fundraising goals.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

12. **Legal and Professional:** Level to which employee knows and follows Samueli Academy’s charter, bylaws, policies, applicable state and federal laws and regulations, and other relevant standards for charter schools and has effectively worked with Samueli Academy’s attorneys in personnel, general liability, insurance and regulatory compliance matters.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

13. **Leadership and Interpersonal Skills:** Level to which employee has demonstrated leadership and effective interpersonal skills, such as providing effective leadership, guidelines and direction to ensure that policies related to curriculum, instruction, pupil personnel services, personnel, budget and business affairs are carried out appropriately.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

14. **Ethical Behavior:** Level to which employee has worked appropriately within professional and ethical guidelines and serves as an ethical model to the community as well as the Samueli Academy staff and students.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

Additional Performance-Related Thoughts

What are the employee's strongest points?

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What are the employee's weakest points?

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What can the employee do to be more effective or make improvements?

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What additional training would benefit the employee?

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Additional Comments and/or Recommendations

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Additional Employee Comments

What are your most important accomplishments over the past year?

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What are your weakest areas and how could you improve?

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Other concerns you would like to discuss.

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Upon approval by the Board of the evaluation, a representative of the Board and the employee should sign this form acknowledging the approved evaluation was reviewed with the employee.

Signature of Board Representative

Date

Signature of Employee

Date

* Note: The signature of the employee above indicated that the evaluation has been reviewed with him/her. It does not imply agreement with the evaluation.



Mission: To ignite the passion within all students to reach their greatest potential through a nurturing and innovative learning environment. Vision: All students experience positive education, career, and life outcomes.

Employee Performance Evaluation

(For use with CFO)

Employee Name: _____

Job Title: Chief Financial Officer

Reviewer: _____ **Review Date:** _____

The CFO will generally have at least one annual performance evaluation, although Samueli Academy Board (“Board”) reserves the right to hold such evaluations more or less frequently. Normally, the Governance Committee of the Board, or a subset thereof, will solicit and develop evaluation submissions from itself, the employee’s peer staff members, select others with knowledge of the employee’s performance, a self-evaluation, and intermittent observation. A representative or representatives may meet with the employee to discuss its initial determinations and the employee’s own perspective. Ultimately, an evaluation will be presented to the Board for review, further discussion, and approval as the evaluation. Once approved, the evaluation will be reviewed with the employee.

The expectation is that the employee and/or the Board/Governance Committee will have set goals for such employee for each year. Generally, the performance evaluation will, in part, reflect upon the employee’s success in achieving performance of such annual goals, as well as the employee’s overall performance including with respect to the metrics identified below.

In rating the employee, the expectation is that an employee merely performing the functions of his or her duties will receive a “Satisfactory” rating. A rating above or below “Satisfactory” requires superior or inferior performance rather than merely doing one’s job.

KEY TO RATINGS

EXCELLENT –

Individual performed all tasks in an exceptional manner and exceeded expectations in performance of duties through innovation, taking the initiative, vision, and execution.

GOOD –

Individual performs many tasks well, and all other tasks adequately. Employee has at least met all expectations and exceeded expectations in some areas.

SATISFACTORY -

Individual performs all tasks satisfactorily. Meets expectations.

FAIR –

Individual performs most tasks satisfactorily, but not all. Meets expectations in parts of job performance, but there are areas where improvement is needed.

UNSATISFACTORY –

Individual fails to perform many tasks well. Fails to meet overall expectations.

1. **Job Knowledge and Performance:** Level to which employee understands and performs job responsibilities and duties.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

2. **Job Productivity:** Level to which employee is productive in performing job responsibilities and expectations/needs of the Executive Director, Head of School, the Board, and Board committees.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

3. **Job Dependability:** Level to which employee is dependable in performing job responsibilities, attending meetings of the Board and finance related committees, and meeting expectations/needs of the Executive Director, Head of School, the Board, and Board committees.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

4. **Goal Setting and Achievement:** Level to which employee has participated with the Board and Executive Director in setting realistic but challenging goals designed to maintain and improve both Samueli Academy and self.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

5. **Financial Strategy Formation and Implementation:** Level to which employee has effectively developed and implemented a sound short and long-term operations planning, financial projections, capital projects and campus planning.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

6. **Financial Management:** Level to which employee effectively oversaw and managed financial operations for year, including finance, cash flow, investment activity, capital loans, indebtedness, general accounting, and operating budget, and independent auditors, as well as implemented and maintained appropriate procedures and controls for all financial systems and properly oversaw finance staff and third party vendors with responsibility over accounting activities such as payroll, accounts payable, accounts receivable, cash and cash receipts, general ledger, purchasing, employee benefit administration, taxes and other accounting processes.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

7. **Budgeting:** Level to which employee effectively worked with Head of School to prepare and present the annual budget with input from Executive Director, ensured that expenditures were consistent with budget, as well as implemented and maintained appropriate procedures.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

8. **Staff Talent and Human Resources:** Level to which employee has effectively worked with and assisted the Executive Director, Director of Human Resources and the Board in establishing appropriate salary and employee benefit programs and made any appropriate recommendations to enhance benefits and/or reduce costs, as well as establishing annual goals and evaluating all employees directly reportable to the CFO.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

9. **Filing Requirements:** Level to which employee has ensured compliance with the filing requirements of all federal, state and local tax agencies as well as other governing bodies such as OCDE and the State DOE.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

10. **Board Relations:** Level to which employee has kept the Board informed about important issues, obtained appropriate approval and input from the Board where necessary, attended Board meetings as necessary, utilized Board member talents in the community, worked effectively to assist the Board achieve its goals and tasks, and assisted the Board achieve its own accountability and level of responsibility.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

11. **Internal Capabilities:** Level to which employee has helped develop and monitor the office and staff environment, technology, equipment, facilities, systems, policies, and procedures that Samueli Academy needs to be effective, including overseeing financial staff.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

12. External Relations: Level to which employee has successfully built and cultivated relations with governments, donors, advisers, grantees, prospects, educational organizations, businesses, social groups and philanthropic organizations that are beneficial to the Samueli Academy’s mission, educational purpose and financial goals.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

13. Fundraising Development: Level to which employee has effectively contributed to fundraising development by successfully helping to obtain donors, grantees, prospects, and philanthropic organizations to meet Samueli Academy’s fundraising and financial goals.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

14. Legal and Professional: Level to which employee knows and follows Samueli Academy’s charter, bylaws, policies, applicable state and federal laws and regulations, and other relevant standards for charter schools, as well as assisting the Executive Director in resolving legal matters related to personnel, general liability, insurance and regulatory compliance.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

15. Leadership and Interpersonal Skills: Level to which employee has demonstrated leadership and effective interpersonal skills.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

16. **Ethical Behavior:** Level to which employee has worked appropriately within professional and ethical guidelines and serves as an ethical model to the community as well as the Samueli Academy staff and students.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

Additional Performance-Related Thoughts
What are the employee's strongest points?
What are the employee's weakest points?
What can the employee do to be more effective or make improvements?
What additional training would benefit the employee?

Additional Comments and/or Recommendations

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Additional Employee Comments
What are your most important accomplishments over the past year?

What are your weakest areas and how could you improve?
Other concerns you would like to discuss.

Upon approval by the Board of the evaluation, a representative of the Board and the employee should sign this form acknowledging the approved evaluation was reviewed with the employee.

Signature of Board Representative _____
Date

Signature of Employee _____
Date

* Note: The signature of the employee above indicated that the evaluation has been reviewed with him/her. It does not imply agreement with the evaluation.



Employee Performance Evaluation

(For use with Head of School)

Employee Name: _____

Job Title: Head of School

Reviewer: _____ **Review Date:** _____

The Head of School will generally have at least one annual performance evaluation, although Samueli Academy Board (“Board”) reserves the right to hold such evaluations more or less frequently. Normally, the Governance Committee of the Board, or a subset thereof, will solicit and develop evaluation submissions from itself, the employee’s peer staff members, select others with knowledge of the employee’s performance, a self-evaluation, and intermittent observation. A representative or representatives may meet with the employee to discuss its initial determinations and the employee’s own perspective. Ultimately, an evaluation will be presented to the Board for review, further discussion, and approval as the evaluation. Once approved, the evaluation will be reviewed with the employee.

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KEY TO RATINGS

EXCELLENT –

Individual performed all tasks in an exceptional manner and exceeded expectations in performance of duties through innovation, taking the initiative, vision, and execution.

GOOD –

Individual performs many tasks well, and all other tasks adequately. Employee has at least met all expectations and exceeded expectations in some areas.

SATISFACTORY -

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FAIR –

Individual performs most tasks satisfactorily, but not all. Meets expectations in parts of job performance, but there are areas where improvement is needed.

UNSATISFACTORY –

Individual fails to perform many tasks well. Fails to meet overall expectations.

1. **Job Knowledge and Performance:** Level to which employee understands and performs job responsibilities and duties.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

2. **Job Productivity:** Level to which employee is productive in performing job responsibilities and expectations/needs of the Executive Director and Board.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

3. **Job Dependability:** Level to which employee is dependable in performing job responsibilities and expectations/needs of the Executive Director and Board.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

4. **Strategy Formation and Implementation:** Level to which employee has developed and implemented a sound strategic plan and translated it into effective work plans to achieve Samueli Academy’s objectives and goals, direct and inspire teachers and staff of Samueli Academy, ensure compliance with the charter, and meet the needs of the students through a rigorous college/career preparatory program.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

5. **Goal Setting and Achievement:** Level to which employee has participated with the Board, Executive Director, the Samueli Academy staff, and parents in setting realistic but challenging short-range and long-range goals and objectives designed to maintain and improve both Samueli Academy and self.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

6. **Administration:** Level to which employee effectively has served as educational leader in maintaining a vision in aligned with the school’s mission, oversaw day-to-day responsibility of the school and its staff, worked in partnership with Board to refine the school’s mission, worked with the Board and Executive Director to develop school policies and procedures, managed student behavior, and ensured quality teaching and learning.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

7. **Curriculum:** Level to which employee effectively has enabled students to become self-motivated and develop strong skills in relevant areas, implemented and utilized a project-based instructional approach to teaching and delivering Common Core standards-based content, assisted in developing educational program of a college and career academy, provided a rigorous and engaging curriculum with an emphasis on STEAM.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

8. **Financial Management and Fundraising:** Level to which employee effectively has worked with the Executive Director and CFO on finances, maintaining the physical plant, assisting in the development and formulation of an annual budget and helping to ensure that the approved budget was attained. Level to which employee has effectively contributed to fundraising development by successfully helping to obtain donors, grantees, prospects, and philanthropic organizations to meet Samueli Academy’s fundraising and financial goals.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

9. **Staff Talent and Human Resources:** Level to which employee has effectively worked with the Director of Human Resources to attract, retain, and develop qualified faculty and staff, created a dynamic and collaborative teaching team, assisted the Executive Director and Board in establishing salary and benefit programs, and assisted in setting employee goals to meet Samueli Academy’s needs now and in the foreseeable future.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

10. **Board Relations:** Level to which employee has kept the Board informed about important issues, obtained appropriate approval and input from the Board where necessary, attended Board meetings as necessary, utilized Board member talents in the community, worked effectively to assist the Board achieve its goals and tasks, and assisted the Board achieve its own accountability and level of responsibility.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

11. **Internal Capabilities:** Level to which employee has helped develop the office and staff environment, technology, equipment, facilities, systems, policies, and procedures that Samueli Academy needs to be effective, including effectively partnering with Samueli Academy's residential program manager.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

12. **External Relations:** Level to which employee has successfully built and cultivated relations with governments, donors, advisers, grantees, prospects, educational organizations, businesses, social groups and philanthropic organizations that are beneficial to Samueli Academy’s mission, educational purpose and financial goals and otherwise effectively represented the Board and Samueli Academy in interactions with parents, other citizens, and community and regulatory agencies.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

13. **Legal and Professional:** Level to which employee knows and follows Samueli Academy’s charter, bylaws, policies, applicable state and federal laws and regulations, and other relevant standards for charter schools.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

14. **Leadership and Interpersonal Skills:** Level to which employee has demonstrated leadership and effective interpersonal skills, such as providing effective leadership, guidelines and direction to ensure that policies related to curriculum, instruction, pupil personnel services, personnel, budget and business affairs are carried out appropriately.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

15. **Ethical Behavior:** Level to which employee has worked appropriately within professional and ethical guidelines and serves as an ethical model to the community as well as the Samueli Academy staff and students.

OVERALL RATING: (Select One)	EXCELLENT	GOOD	SATISFACTORY	FAIR	UNSATISFACTORY	SEE KEY RATINGS
Comments:						

Additional Performance-Related Thoughts
What are the employee's strongest points?
What are the employee's weakest points?
What can the employee do to be more effective or make improvements?
What additional training would benefit the employee?

Additional Comments and/or Recommendations

Additional Employee Comments
What are your most important accomplishments over the past year?
What are your weakest areas and how could you improve?
Other concerns you would like to discuss.

Upon approval by the Board of the evaluation, a representative of the Board and the employee should sign this form acknowledging the approved evaluation was reviewed with the employee.

Signature of Board Representative Date

Signature of Employee Date

* Note: The signature of the employee above indicated that the evaluation has been reviewed with him/her. It does not imply agreement with the evaluation.