

Fiscal Responsibility Rubric

Name of Student:

Date Completed:

FISCAL RESPONSIBILITY OUTCOMES	<u>NOVICE</u>	<u>TRANSITION</u>	<u>INTERMEDIATE</u>	<u>TRANSITION</u>	<u>ADVANCED</u>
	Awareness or Base Level Knowledge	From Novice to Intermediate	Apply the concept somewhat	From Intermediate to Advanced	Intentional and Effective Application
Integrity/Competence	Does not think through the process; focuses on immediate needs not the correct process; does not recognize conflicts of interest in the process; inconsistent with following policies; has not received proper training; does not understand consequences of actions regarding fiscal matters; does not demonstrate understanding of policies and procedures		Follows the rules and policies they know; does not exhibit critical thinking for events they encounter; has received proper training, but regularly makes mistakes; able to identify some consequences of actions		Critically thinks through possible consequences for anything they are not familiar with; leads training sessions; understands and follows policy and procedure
Accountability/ Disclosure	Does not understand the concept of separation of duties; does not understand why there is a need to be responsible to someone else; needs constant supervision; financial information they need to provide is not readily available; financial information is not reviewed or updated regularly; financial information they need to provide is not easy-to-understand; unable to answer questions regarding fiscal decisions of organization		Understands why a separation of duties is important; understands why there is a need to be responsible to someone else; tries to follow the processes but is not necessarily successful; needs some supervision and reassurance; financial information is periodically reviewed and updated; financial information is made available to a limited number of individuals; financial information is organized, but not necessarily simplified; able to monitor fiscal accounts, but does not exactly understand what needs to be done with the information		Knows why there is and how to accomplish a separation of duties and can teach others; regularly checks accounts and inventory for accuracy and knows how to address issues of inaccuracy; minimal supervision and reassurance needed; financial information is offered and made available in multiple formats and venues; financial information is easy-to-understand; financial information is updated and reviewed regularly; can answer and justify all concerns and decisions regarding fiscal matters of organization

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Efficiency/ Funding Adequacy	No knowledge of resources available to the organization; no knowledge of how resources can be used to meet organization's needs; needs step-by-step guidance on procedures		Aware of available resources; may not understand how resources can be used to benefit the organization; requires little personal guidance but still goes through a step-by-step process for procedures		Knows about available resources; knows how to utilize resources for the benefit of the organization; completes project without assistance; is capable of generating more efficient ways to address the management of resources
Student Engagement	Does not understand how fiscal experiences within the organization can apply to other areas of life; does not make decisions with regard to the organization as a whole; low involvement in fiscal processes; relies on peers and/or advisor to accomplish most of work; does not differentiate from other organizations		Is beginning to understand how skills learned in this area can transfer to other areas of life, but not all connections are made; will make decisions with the immediate needs of the organization in mind, but does not consider long-term effects of decisions; works with peers and/or advisors to accomplish responsibilities relating to fiscal matters; able to address fiscal concerns relating to specific areas within organization, but does not have a grasp of the overall fiscal health of the organization; understands diverse needs of the organization but does not know how it differs from other organizations		Transferability of skills and concepts occurs for other areas of life; achieves fiscal responsibilities at a high level; long and short-term effects of fiscal decisions are considered; has significant involvement in the fiscal process (creating budgets, monitoring spending, etc.); assists others with the development of fiscal policy; considers diverse needs of the organization and how it differs from other organizations

COMMENTS: