**ATTACHMENT D**

**

##### *Criteria for the Evaluation of School Administrative Support (Secretary) Performance*

**HORIZON SCHOOL DIVISION**

**Employee Evaluation: School Secretary**

**SECTION ONE**

**Introduction**

Name

Start Date for Current Position

Evaluator

Date

**Reason for evaluation:**

Employee request

To determine if newly promoted employee meets standards

Employee has not developed and implemented a Growth Plan

Employee may not be meeting the School Secretary Performance Areas

90 Days Probationary evaluation process for employees new to the division (90 Days Worked)

Other (Please Indicate) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**SECTION TWO**

**School Secretary – Quality Standards**

**Within the expectations of the School Secretary position, the employee will be evaluated within five performance areas: Organization and Preparation; Interpersonal Skills and Professional Attributes; Supporting School Operations, Student Information and Financial Management.**

* All areas should be marked as proficient, needs improvement, or not applicable. For the purposes of this form, “proficient” describes job performance that meets the minimum standard of performance in each area. “needs improvement” describes job performance that does not meet the acceptable standard in an area
* All marked “needs improvement” must be accompanied by supporting documentation (i.e. anecdotal comments).

This document sets out PERFORMANCE AREAS. The KEY INDICATORS for each performance area identify the activities that secretaries undertake as they go through their day-to-day work. The DESCRIPTORS support the key indicators, though evidence of all descriptors would not be expected at all times.

|  |  |  |  |
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| PERFORMANCE AREA: ORGANIZATION AND PREPARATION | | | |
| KEY INDICATOR: The secretary demonstrates evidence of effective organization and preparation | | | |
| DESCRIPTORS: | Proficient | NeedsImprovement | NotApplicable |
| * Arrives on time and is prepared. |  |  |  |
| * Models and utilizes time management skills. |  |  |  |
| * Uses time effectively (includes attendance, punctuality, setting of priorities, keeping to schedules). |  |  |  |
| * Works in an efficient manner. |  |  |  |
| * Prepares and disseminates materials for meetings as requested by Principal or designate . |  |  |  |
| * Schedules, attends and records minutes for school meetings when requested by Principal or designate. |  |  |  |
| * Provides support and assistance to administrative staff and student(s). |  |  |  |
| * Performs other related duties as required by the school principal or designate. |  |  |  |
| PERFORMANCE AREA: INTERPERSONAL SKILLS AND PROFESSIONAL ATTRIBUTES | | | |
| KEY INDICATOR: The secretary demonstrates effective interpersonal skills and professional attributes. | | | |
| DESCRIPTORS: | Proficient | NeedsImprovement | NotApplicable |
| * Demonstrates respect for students, parents/guardians, staff and others. |  |  |  |
| * Responds to student, parent, staff, and school community enquires in a professional, supportive way. |  |  |  |
| * Informs students, parents, and school community of school events as directed. |  |  |  |
| * Demonstrates excellent communication skills both in written and oral format. |  |  |  |
| * Maintains a high standard of confidentiality related to Division matters and student and staff personal information. |  |  |  |
| * Communicates through proper channels. |  |  |  |
| * Communicates with parents regarding tardiness and absences. |  |  |  |
| * Has proven public relations skills and demonstrated ability in promoting and maintaining effective working relations with public, student(s), school and division staff. |  |  |  |
| * Arranges school meetings and events as requested by the school principal. |  |  |  |
| * Participates in staff professional development days, training or seminars as required. |  |  |  |
| * Maintains school website and/or school newsletters. |  |  |  |
| * Takes initiative (self-directed, takes charge of assigned tasks, requires minimum supervision). |  |  |  |
| * Maintains appropriate personal hygiene and appearance. |  |  |  |
| * Models appropriate behavior. |  |  |  |
| * Maintains professional space and proper etiquette. |  |  |  |
| * Books facilities and transportation for school trips. |  |  |  |
| * Provides first aid according to level of training. |  |  |  |
| **PERFORMANCE AREA: SUPPORTING SCHOOL OPERATIONS** | | | |
| **KEY INDICATOR: The secretary demonstrates the skills to effectively support school operations.** | | | |
| DESCRIPTORS: | Proficient | NeedsImprovement | NotApplicable |
| * Oversees and implements a broad range of office operations. |  |  |  |
| * Receives, responds or redirects phone calls, emails, mail and all other forms of communication in a timely and competent manner. |  |  |  |
| * Carries out office equipment maintenance procedures. |  |  |  |
| * Calls appropriate support when there are issues with school equipment (i.e. technology support, maintenance, or photocopier). |  |  |  |
| * Assists school principal in updating School Safety Plan, Emergency Call Trees, Student/Staff Handbook, and any other important yearly documents. |  |  |  |
| * All files kept up to date (i.e. Student transportation forms, finance etc.). |  |  |  |
| * Tracks school guests/visitors. |  |  |  |
| * Sends home school forms and appropriately tracks and files returned ones. |  |  |  |
| * Inventories and orders school supplies and materials. |  |  |  |
| * Prepares letter, memos, examinations, newsletters and other materials as requested by school principal. |  |  |  |
| * Records and updates student medical information. Administers medications and first aid to student(s). Cares for sick/injured student(s) and contacts parents or guardians. |  |  |  |
| * Completes division office requests in a timely and thorough manner. |  |  |  |
| * Photocopies materials for administrative and teaching staff. |  |  |  |
| * Assists in preparation of report cards. |  |  |  |
| **PERFORMANCE AREA: STUDENT INFORMATION** | | | |
| **KEY INDICATOR: The secretary demonstrates the skills to effectively manage student information.** | | | |
| DESCRIPTORS: | Proficient | NeedsImprovement | NotApplicable |
| * Effectively completes student registration |  |  |  |
| * Student and Staff Schedules entered and kept up to date in Powerschool. Schedules provided to staff and students. |  |  |  |
| * Set up school year in PowerSchool. |  |  |  |
| * Able to download or print reports from Powerschool (i.e. class lists). |  |  |  |
| * Ensure students are syncing between Powerschool and PASI. |  |  |  |
| * Understands how to use PASI as required. |  |  |  |
| * Student report cards printed and sent home on time. |  |  |  |
| * Student files kept up to date (Powerschool, CUM and School). |  |  |  |
| * Register students for PATs and DIPS (including creating sittings for DIPs in PASI). |  |  |  |
| * High school course marks stored and submitted on time via syncing Powerschool with PASI. |  |  |  |
| * Print PAT Individual Student Profiles – file and distribute as required. |  |  |  |
| * Track other student data as required by school principal (i.e. attendance). |  |  |  |
| * Maintains student records with confidentiality and professionalism. |  |  |  |
| * Assists in entering student attendance as required. |  |  |  |
| * Prepares and distribute transcript requests as required. |  |  |  |
| **PERFORMANCE AREA: FINANCIAL MANAGEMENT** | | | |
| **KEY INDICATOR: The secretary demonstrates the skills to effectively manage school financial responsibilities.** | | | |
| DESCRIPTORS: | Proficient | NeedsImprovement | NotApplicable |
| * Codes and secures appropriate approval for school invoices from Accounts Payable. |  |  |  |
| * Maintains computerized financial records for school decentralized budget; processes statements, reviews monthly budget control statements. Updates administrators and teachers regarding expenditures and balances. |  |  |  |
| * Monthly reconciliation of school credit card statements. Balances accounts. |  |  |  |
| * Ensures invoices are paid in a timely fashion. |  |  |  |
| * Issues reimbursements. |  |  |  |
| * Tracks SGF in KEV. |  |  |  |
| * Balances all school accounts and issues all school cheques. |  |  |  |
| * Bank deposits completed effectively and in a timely manner. |  |  |  |
| * Monitors budget and forecasts budgetary needs. |  |  |  |
| * Liaises with finance department regarding budget administration. |  |  |  |

**ADDITIONAL DUTIES AND EMPLOYEE’S CONTRIBUTIONS TO THE SCHOOL DIVISION THAT ARE GENERALLY BEYOND THE JOB DESCRIPTION**

**COMMENTS:**

**DECISION**

Completed probationary process. Overall is meeting the expected performance areas.

Recommendation for termination

**EVALUATOR’S COMMENTS**

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| Support Staff Signature  **(acknowledging receipt of report)** |  | Date |
| \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Support Staff Supervisor Signature |  | Date |
| \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| School Administrator/Facility Supervisor Signature |  | Date |
|  |  |  |

* Original copy goes to Human Resources for employee’s file
* Copy to Employee
* Copy to Principal or Supervisor