

ATTACHMENT R

Criteria for the Evaluation of Operation and Maintenance Administrative Assistant Performance



**HORIZON SCHOOL DIVISION NO. 67**

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**Employee Evaluation:  
Operation and Maintenance Administrative Assistant  
SECTION ONE**

**Introduction**

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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 Facilities Department Employee Performance Areas
- 120 Days Probationary evaluation process for employees new to the division (120 Days Worked)
- Other (Please Indicate) \_\_\_\_\_

**SECTION TWO**

**Operation and Maintenance Administrative Assistant – Quality Standards**

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**Within the expectations of the Operation and Maintenance Administrative Assistant position, the employee will be evaluated within five performance areas: General Expectations, Organization and Preparation, Supporting Maintenance Department Operations, Financial Management, and Interpersonal Skills and Professional Attributes,**

- 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 Operation and Maintenance Administrative Assistant 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.

**PERFORMANCE AREA: GENERAL EXPECTATIONS**

**KEY INDICATOR: The Operation and Maintenance Administrative Assistant demonstrates evidence of effective adherence to General Expectations**

**DESCRIPTORS:**

**Proficient      Needs Improvement      Not Applicable**

- Supports the Facilities Manager as the liaison between:
  - a) Alberta Education Capital Planning,
  - b) Alberta Infrastructure
  - c) The Board of Trustees
  - d) Division Office personnel
  - e) Division school staff, including Hutterite Colony Schools and Kanadier Schools
  - f) All Maintenance Department personnel
  - g) Regular Maintenance Department Contractors, i.e. caretaking, security, grounds maintenance, millwork, electrical, etc.
  - h) School Facility Project Architects, Engineers, Inspectors, Contractors, etc.
  - i) Any other contractors hired for periodic school facilities maintenance (e.g. painters, graffiti removers, bulk snow removal, etc.
- Manages the office, and as required, in consultation with appropriate Division Office authorities and/or regular maintenance personnel when the Facilities Manager is away.
- Assumes responsibility and makes decisions within scope of authority in matters of the Maintenance Department and maintenance related school facility needs, under little or no supervision.
- This position is responsible for the supervision of part-time and/or temporary assistants assisting with clerical duties.
- Assists the Facilities Manager with the preparation and processing of confidential matters relating to employees of the Maintenance Dept. including the possible processing of employee evaluations, matters related to collective agreements, and working within the employers strategy for the resolution of grievances, including being present at, and conducting meetings and hearings, as the employers representative, with Maintenance staff and the union.
- Assumes responsibility for as routine matters and procedures thus sharing the Facilities Manager in office workload.
- Work with the Horizon Maintenance Department team to ensure that all school facilities provide a safe, reliable, and positive physical environment for all staff, students and public through proper maintenance and preventative maintenance of all interior, and where applicable, exterior school spaces.
- Present and promote positive reinforcement of Board and Maintenance Department policies and practices, in providing service to all staff, students and stakeholders.
- Working cooperatively with all Maintenance Department personnel and assisting other Maintenance personnel as requested or as directed by the Facilities Manager.
- Meet and abide by all Maintenance department regulations that are listed in the Horizon Maintenance department employee manual and other sources of information and in accordance with Horizon Board policy.

- Provide daily and ongoing information and communication with the Facilities Manager on work assignments, problems, temporary staffing concerns, safety hazards, work completed, outstanding work, work schedules, etc.
- Active participation in in-house professional development to remain informed of maintenance industry practices and products is required.
- Attend the daily morning organizational & schedule meeting and be prepared to discuss daily work and schedule changes, new work requests, and other relevant topics. At the end of each work day, check in at the Maintenance office to confirm work completion for the day and to check your mailbox for new work orders, before leaving the worksite for the day.
- Contribute to an accident-free work environment by complying with operator's instructions for the use of power tools, wearing protective equipment such as goggles, hearing protectors, back supports, and work gloves, reporting incidents of unsafe work activity to supervisors, and following standard safety precautions during work.
- Contributes to the overall success of the maintenance department by performing other essential duties and responsibilities as assigned.

**PERFORMANCE AREA: ORGANIZATION AND PREPARATION**

**KEY INDICATOR: The Operation and Maintenance Administrative Assistant demonstrates evidence of effective organization and preparation**

**DESCRIPTORS:**

- |  | Proficient               | Needs Improvement        | Not Applicable           |
|--|--------------------------|--------------------------|--------------------------|
| • Arrives on time and is prepared.   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Uses time effectively (includes attendance, punctuality, setting of priorities, keeping to schedules). | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Prepares and disseminates materials for meetings as requested by Facilities Manager                    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Schedules, attends and records minutes for maintenance meetings when requested by Facilities Manager.  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Provides support and assistance to Facilities Manager.   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Performs other related duties as required by the Facilities Manager.                                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Keep informed on computer software and programming in regards to their function and operation.         | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Maintaining an accurate and up-to-date filing system.  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Ensuring all parties are contacted and reminded regarding meetings, changes in plans, etc.             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

**PERFORMANCE AREA: SUPPORTING MAINTENANCE DEPARTMENT OPERATIONS**

**KEY INDICATOR: The Operation and Maintenance Administrative Assistant demonstrates the skills to effectively support maintenance department operations.**

**DESCRIPTORS:**

- |  | Proficient               | Needs Improvement        | Not Applicable           |
|--|--------------------------|--------------------------|--------------------------|
| • Oversees and implements a broad range of office operations.  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Receives, responds or redirects phone calls, emails, mail and all other forms of communication in a timely and competent manner. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Carries out office equipment maintenance procedures.   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

- Calls appropriate support when there are issues with equipment (i.e. technology support, maintenance, or photocopier).
- Assists facilities manager in updating Safety Plan, Emergency Call Trees, Staff Handbook, and any other important yearly documents.
- All files kept up to date (i.e. Student transportation forms, finance etc.).
- Tracks guests/visitors.
- Inventories and orders maintenance department supplies and materials, observing cost effective procedures.
- Prepares letter, memos, and other materials as requested by Facilities Manager.
- Completes division office requests in a timely and thorough manner.
- Photocopies materials for Facilities Manager.
- This position will assist the Facilities Manger (FM) with the processing and routine management of all purchases, contracts, and Maintenance Service Work Orders, related to the Maintenance Department.
- Work with Division Administration to ensure all Capital, I.M.R. and One-Time funds are recorded and managed appropriately.
- Sort completed Purchase Orders for appropriate filing, e.g. Capital Project or I.M.P. binders, regular filing system, etc. and then file.
- Carry out all necessary communications with vendors and purchasers in order to resolve problems and clarify concerns in order to expedite the accurate settlement of accounts.
- Process accurate year-end data, with information included to substantiate all related transactions and supply to Division Office Finance Department.
- Distribute tender packages for yearly Caretaking Supply Tender. Compile supplier price comparison spreadsheet, and issue Purchase Order to appropriate suppliers.
- Participate in tender openings as required.
- Receiving equipment, keeping record of serial numbers, purchase date, etc. for warranty tracking purposes and/or parts/service requirements and distribution of equipment to appropriate department, e.g. maintenance staff, school caretaker, groundskeeper, etc.
- Process information and order parts and/or arrange for repair for miscellaneous tools and equipment.
- Monitoring of any deficiencies or concerns with supplies or equipment received.
- Advertising for applicants and management of government assisted programs such as Alberta Community Employment (A.C.E.) Program, Student Temporary Employment (STEP), and Summer Career Placement (SCP), including reference checks and scheduling of interviews.
- Advertising in local newspapers regarding school maintenance matters and providing assistance to respondents.
- Assists with receiving and processing of employment applications, including interviewing candidate when applicable, completing reference checks and confirming previous employment.

- Attending meetings as required, recording, developing and distributing meeting minutes.
- Contacting schools following meetings regarding Maintenance Department decisions relative to their schools.
- Arranging luncheons and/or refreshments for Maintenance Department workshops and meetings.
- Making reservations and travel arrangements for Facilities Manager and Maintenance Department staff as requested.
- Responsible for Maintenance Department vehicle records.
- Prepare Maintenance Department blank monthly time sheets with employee names, insertion of Saturday, Sunday and Statutory Holiday dates and distribution of copies to employees for each month of the year.
- Preparing Maintenance and caretaking materials for shipment on the school division courier.
- Assist in work related to BLIMS capital submissions and RECAPP updates
- Workplace Safety Plans related work. Work cooperatively with the Horizon safety officer and assist where necessary and available.
- Prepare and update WHMIS manuals for caretakers/contractors ensuring that all required SDS sheets are provided. Update SDS sheets every three years as required by WHMIS legislation.
- Train caretakers, maintenance staff and Horizon school division employees for WHMIS certification
- Preparation, design and production of reports, forms, graphic needs, staff lists, telephone lists, staffing information and other bulletins appropriate to this office.
- Ordering of supplies and equipment needed for all aspects of maintenance related to school facility needs, observing cost effective procedures.

**PERFORMANCE AREA: FINANCIAL MANAGEMENT**

**KEY INDICATOR: The Operation and Maintenance Administrative Assistant demonstrates the skills to effectively manage school financial responsibilities.**

**DESCRIPTORS:**

- |   | <b>Proficient</b>        | <b>Needs Improvement</b> | <b>Not Applicable</b>    |
|---|--------------------------|--------------------------|--------------------------|
| • Codes and secures appropriate approval for invoices from Accounts Payable.  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Maintains computerized financial records for budget; processes statements, reviews monthly budget control statements. Updates Facilities Manager regarding expenditures and balances. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Monthly reconciliation of school credit card statements. Balances accounts.   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Ensures invoices are paid in a timely fashion.  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Issues reimbursements.  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Balances all maintenance department accounts and works with accounts payable regarding all maintenance department cheques.  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Monitors budget and forecasts budgetary needs.  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Liaises with finance department regarding budget administration.  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

- Investigate pricing of quality products and services for the most efficient product or required service, while keeping costs saving in mind.
- Collect financial information, maintain records, and process Purchase Orders for Capital Funded Projects, I.M.R., One-Time Funds and annual Operations and Maintenance funds and budgets.
- Supervise, record and disburse petty cash for the Maintenance Department, ensuring that original receipts are received and signed by employee and accurate account coding is completed.
- Track costs and process invoice for school facility vandalism related incidents, forwarding the original to the individual involved and a copy to Division Office.
- Receive, open, classify and process all mail addressed to the Facilities Manager and Maintenance Department.
- Gathering miscellaneous data regarding a variety of matters as required.
- Provides first aid according to level of training.
- Reconcile Purchase Orders with invoices and enter into the Accounts Payable system.
- Composing and typing routine letters, memos, and a variety of other documents, some of which may be confidential, for the facilities manager and maintenance department staff.

**PERFORMANCE AREA: INTERPERSONAL SKILLS AND PROFESSIONAL ATTRIBUTES**

**KEY INDICATOR: The Operation and Maintenance Administrative Assistant demonstrates effective interpersonal skills and professional attributes.**

**DESCRIPTORS:**

- |  | Proficient               | Needs Improvement        | Not Applicable           |
|--|--------------------------|--------------------------|--------------------------|
| • Demonstrates respect for students, parents/guardians, staff and others.  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Responds to staff, and school community enquires in a professional, supportive way.  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Demonstrates excellent communication skills both in written and oral format.   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Communicates with staff regarding tardiness and absences.  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Has proven public relations skills and demonstrated ability in promoting and maintaining effective working relations with public, student(s), school and division staff. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Takes initiative (self-directed, takes charge of assigned tasks, requires minimum supervision).  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Models appropriate behavior.   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Contributes to a positive school culture.  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Maintains a high standard of confidentiality   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Maintains appropriate personal hygiene and appearance.   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Maintains proper etiquette.  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Models appropriate behavior.   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Works as a TEAM member.  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

- Communicates effectively and through the proper channels
- Ensure the safety and well being of students at all times.

**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**

\_\_\_\_\_  
 Support Staff Signature  
**(acknowledging receipt of report)**

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Support Staff Supervisor Signature

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 School Administrator/Facility Supervisor Signature

\_\_\_\_\_  
 Date

- |  |
|--|
| <ul style="list-style-type: none"> <li>• Original copy goes to Human Resources for employee’s file</li> <li>• Copy to Employee</li> <li>• Copy to Principal or Supervisor</li> </ul> |
|--|