

ATTACHMENT D

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



**HORIZON SCHOOL DIVISION NO. 67**

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**Employee Evaluation: School Secretary**

**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 School Secretary Performance Areas
- 120 Days Probationary evaluation process for employees new to the division (120 Days Worked)
- Other (Please Indicate) \_\_\_\_\_

**SECTION TWO**

**School Secretary – Quality Standards**

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**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.

**PERFORMANCE AREA: ORGANIZATION AND PREPARATION**

**KEY INDICATOR: The secretary demonstrates evidence of effective organization and preparation**

<b>DESCRIPTORS:</b>	<b>Proficient</b>	<b>Needs Improvement</b>	<b>Not Applicable</b>
• Arrives on time and is prepared.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Models and utilizes time management skills.	<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"/>
• Works in an efficient manner.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Prepares and disseminates materials for meetings as requested by Principal or designate .	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Schedules, attends and records minutes for school meetings when requested by Principal or designate.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Provides support and assistance to administrative staff and student(s).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Performs other related duties as required by the school principal or designate.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

**KEY INDICATOR: The secretary demonstrates effective interpersonal skills and professional attributes.**

<b>DESCRIPTORS:</b>	<b>Proficient</b>	<b>Needs Improvement</b>	<b>Not Applicable</b>
• Demonstrates respect for students, parents/guardians, staff and others.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Responds to student, parent, staff, and school community enquires in a professional, supportive way.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Informs students, parents, and school community of school events as directed.	<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"/>
• Maintains a high standard of confidentiality related to Division matters and student and staff personal information.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Communicates through proper channels.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Communicates with parents 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"/>
• Arranges school meetings and events as requested by the school principal.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Participates in staff professional development days, training or seminars as required.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Maintains school website and/or school newsletters.	<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"/>
• Maintains appropriate personal hygiene and appearance.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Models appropriate behavior.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Maintains professional space and proper etiquette.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Books facilities and transportation for school trips.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Provides first aid according to level of training.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**PERFORMANCE AREA: SUPPORTING SCHOOL OPERATIONS**

**KEY INDICATOR: The secretary demonstrates the skills to effectively support school operations.**

**DESCRIPTORS:**

	<b>Proficient</b>	<b>Needs Improvement</b>	<b>Not Applicable</b>
• 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 school equipment (i.e. technology support, maintenance, or photocopier).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Assists school principal in updating School Safety Plan, Emergency Call Trees, Student/Staff Handbook, and any other important yearly documents.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• All files kept up to date (i.e. Student transportation forms, finance etc.).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Tracks school guests/visitors.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Sends home school forms and appropriately tracks and files returned ones.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Inventories and orders school supplies and materials.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Prepares letter, memos, examinations, newsletters and other materials as requested by school principal.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• 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.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Completes division office requests in a timely and thorough manner.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Photocopies materials for administrative and teaching staff.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Assists in preparation of report cards.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**PERFORMANCE AREA: STUDENT INFORMATION**

**KEY INDICATOR: The secretary demonstrates the skills to effectively manage student information.**

**DESCRIPTORS:**

	<b>Proficient</b>	<b>Needs Improvement</b>	<b>Not Applicable</b>
• Effectively completes student registration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Student and Staff Schedules entered and kept up to date in Powerschool. Schedules provided to staff and students.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Set up school year in PowerSchool.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Able to download or print reports from Powerschool (i.e. class lists).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Ensure students are syncing between Powerschool and PASI.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Understands how to use PASI as required.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Student report cards printed and sent home on time.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Student files kept up to date (Powerschool, CUM and School).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Register students for PATs and DIPS (including creating sittings for DIPS in PASI).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• High school course marks stored and submitted on time via syncing Powerschool with PASI.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 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:**

	<b>Proficient</b>	<b>Needs Improvement</b>	<b>Not Applicable</b>
• Codes and secures appropriate approval for school invoices from Accounts Payable.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Maintains computerized financial records for school decentralized budget; processes statements, reviews monthly budget control statements. Updates administrators and teachers 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"/>
• Tracks SGF in KEV.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Balances all school accounts and issues all school cheques.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Bank deposits completed effectively and in a timely manner.	<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"/>

**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

- Original copy goes to Human Resources for employee's file
- Copy to Employee
- Copy to Principal or Supervisor