

### **School Secretary Performance Evaluation**

The primary purpose of performance evaluation is to encourage and support overall performance growth. Feedback and guidance on performance is provided informally on an on-going basis through open and honest communication between the principal or designate and secretary. This informal communication is essential. A formal evaluation compliments the informal communication.

The purposes of performance evaluations are:

- Improving the secretary's performance;
- Identifying and recognizing strengths;
- Identifying and recommending aspects of performance requiring improvements;
- To assist in developing a Personal Growth Plan (optional discretion of Principal);
- Provide for accountability; and,
- Provide a basis for future recommendations.

#### **I. Procedures (Summative)**

1. The principal or designate will conduct the evaluation of the secretary. Teaching staff will provide some of the information that will serve as the basis of the evaluation.
2. Prior to completing the *Secretary Evaluation Form*, the principal or designate will discuss all the pertinent categories on the form and should make the appropriate direct observations, and/or gather data, as necessary. The principal or designate and secretary may agree to add additional categories given the variation of duties in different schools.
3. Upon completion of the evaluation, ratings and comments will be discussed with the secretary by the principal or designate.
4. Upon review by the secretary, all parties should sign the form. The signature of the secretary indicates that the form was received and discussed. It also implies agreement with the ratings or comments.
5. A copy of the formal evaluation is to be retained by the secretary and the original forwarded to the Superintendent/CEO for information and placement in the personnel file of the secretary. The comments and recommendations made on the form or in the evaluation discussion will be treated as confidential personnel matters. Secretaries who choose to respond to the evaluation ratings or comments may submit letters to the Superintendent/CEO. Such letters will be attached to the evaluation forms and placed in the individual's respective personnel file.
6. When appropriate, principals or designates will monitor the progress made by the secretary in following recommendations regarding needed improvements in practice. Improvements will be acknowledged in writing and will be forwarded by the

principal or designate to the Superintendent who will place the document in the secretary's respective personnel files. Failure by a secretary to meet the performance expectations set by a principal or designate shall be referred to the Superintendent for action.

7. The normal probationary period for newly hired CUPE staff is six months. A monthly informal evaluation will be completed during the probationary period for each library clerk with a formal written evaluation provided to the employee in the third month of the probationary period.
8. The evaluation during probation period will recommend continued employment for the term of the conditions of employment, a possible extension of the probationary period, or will recommend termination.
9. A yearly summative or formative evaluation will be completed for all secretaries by May 30<sup>th</sup>.
10. The supervision process for secretaries shall provide a minimum of two formal summative evaluation reports during the first year of employment in a school, one in the second year, and at least one formal evaluation every three years thereafter, notwithstanding, the Secretary may have an on-going professional development plan that is shared with the principal at the beginning of each school year and reviewed prior to the end of June of each year.

## **II. Procedures (Formative)**

1. A *Formative Growth Plan* is an optional additional procedure that the principal may choose to have the employee complete. The Formative Growth Plan may be submitted annually in consultation with the principal. A written plan should be given to the principal by October 15 of each year.
2. Adjustments to these plans may be made as mutually agreed upon. Documentation, plans, changes will remain in the school with the principal.
3. Principals and employees may use the FGP report provided.



<b>Name:</b>	<b>School:</b>	<b>Employment Date:</b>
<b>Length of time in present position:</b>	<b>Performance Appraisal Date:</b>	<b>Appraiser Name &amp; Position:</b>

**Note:** Additional bullets can be used to adapt the evaluation for mutually agreed duties unique to the school, student population, and grade configuration.

<b>EXPECTED RESPONSIBILITIES</b>	<b>1</b> Inappropriate or Absence of...	<b>2</b> Progressing Towards Meeting Expected Competencies	<b>3</b> Meets expected competencies	<b>4</b> Often exceeds expected competencies	<b>5</b> Always exceeds expected competencies	<b>N/A</b> Not-Applicable
<b>Reception</b> <ul style="list-style-type: none"> <li>▪ Act as main receptionist for student and public, direct or telephone, contact with school office by receiving inquiries and visitors, delivering messages, and directing students to appropriate settings.</li> <li>▪ Records appointments for school administration.</li> <li>▪ Receives and directs telephone messages for support personnel in the school.</li> </ul>						
<b>Comments:</b>						



<b>EXPECTED COMPETENCIES</b>	<b>1</b> Inappropriate or Absence of...	<b>2</b> Progressing Towards Meeting Expected Competencies	<b>3</b> Meets expected competencies	<b>4</b> Often exceeds expected competencies	<b>5</b> Always exceeds expected competencies	<b>N/A</b> Not-Applicable
<p><b>Secretarial / clerical</b></p> <ul style="list-style-type: none"> <li>▪ Secretary to school administration.</li> <li>▪ Clerical duties include computer usage, office correspondence, memoranda, reports and forms, copying, arranging teacher interviews, and distributing materials.</li> <li>▪ Bookkeeping and accounting tasks as may be assigned.</li> <li>▪ Distributes and sorts all incoming school mail and processes outgoing mail generated by the school.</li> <li>▪ Establishes and maintains files for correspondence, office order catalogues, office reports, office and school memos, school supervision and timetable schedules, and student mark statements.</li> <li>▪ Uses the Administrative package to maintain, student records and information as required.</li> <li>▪ Uses EIS for student demographics</li> <li>▪ Uses the accounting program to maintain records of Type "A" funding</li> <li>▪ Processes incoming and outgoing student files.</li> <li>▪ Assists with layout, preparation, and publishing of regular school newsletters and special programs.</li> <li>▪ Assists with preparation of school supply orders including checking and disbursing supplies when received in the school and maintaining records and inventory of supplies.</li> <li>▪ Assists with teacher substitutes and E.A. routines and maintains record keeping at discretion of the principal.</li> <li>▪ Assists with graduation and closing exercises by doing clerical preparations and other arrangements.</li> <li>▪ Other duties as assigned.</li> </ul>						
<b>Comments:</b>						



EXPECTED COMPETENCIES	1 Inappropriate or Absence of...	2 Progressing Towards Meeting Expected Competencies	3 Meets expected competencies	4 Often exceeds expected competencies	5 Always exceeds expected competencies	N/A Not-Applicable
<b>Direct student services</b> <ul style="list-style-type: none"> <li>▪ Assists students with office inquiries and appropriate information</li> <li>▪ Manages student attendance procedures as established by the school.</li> </ul>						
<b>Comments:</b>						

EXPECTED COMPETENCIES	1 Inappropriate or Absence of...	2 Progressing Towards Meeting Expected Competencies	3 Meets expected competencies	4 Often exceeds expected competencies	5 Always exceeds expected competencies	N/A Not Applicable
<b>INTERPERSONAL SKILLS (Students)</b> <ul style="list-style-type: none"> <li>• Develops and maintains positive, appropriate relationships.</li> <li>• Recognizes the emotional state of the student.</li> <li>• Communicates effectively and appropriately.</li> <li>• Models appropriate behaviour.</li> </ul>						
<b>INTERPERSONAL SKILLS(Staff)</b> <ul style="list-style-type: none"> <li>▪ Develops and maintains positive, appropriate</li> </ul>						



<ul style="list-style-type: none"> <li>relationships.</li> <li>▪ Recognizes the emotional state of the student.</li> <li>▪ Communicates effectively and appropriately.</li> <li>▪ Models appropriate behaviour.</li> </ul>						
<b>INTERPERSONAL SKILLS (Community)</b> <ul style="list-style-type: none"> <li>▪ Models polite, tactful and courteous communication when dealing with members of the general public.</li> <li>▪ Develop and maintain positive and appropriate relationships with students, staff, parents and the public.</li> </ul>						
<b>Comments:</b>						

<b>EXPECTED COMPETENCIES</b>	<b>1</b> Inappropriate or Absence of...	<b>2</b> Progressing Towards Meeting Expected Competencies	<b>3</b> Meets expected competencies	<b>4</b> Often exceeds expected competencies	<b>5</b> Always exceeds expected competencies	<b>N/A</b> Not Applicable
<b>Protocol</b> <ul style="list-style-type: none"> <li>• Knows and follows expected protocol (chain of command) when expressing concerns.</li> <li>• Knows and follows and supports school policies and procedures related to discipline.</li> <li>• Know and follows division and/or provincial protocols (Medical protocol, Reporting of Suspected Child Abuse).</li> </ul>						
<b>Comments:</b>						



<b>EXPECTED COMPETENCIES</b>	<b>1</b> Inappropriate or Absence of...	<b>2</b> Progressing Towards Meeting Expected Competencies	<b>3</b> Meets expected competencies	<b>4</b> Often exceeds expected competencies	<b>5</b> Always exceeds expected competencies	<b>N/A</b> Not Applicable
<b>Experience Training Professional Development</b> <ul style="list-style-type: none"> <li>• Willingly participates in mandatory workshops.</li> <li>• Shows interest/initiative in accepting or acquiring information in areas relevant to their assignment.</li> <li>• Appropriately shares new information/materials with school personnel</li> <li>• Demonstrates functional level of competence in the use of computer technology.</li> </ul>						
<b>Comments:</b>						

<b>EXPECTED COMPETENCIES</b>	<b>1</b> Inappropriate or Absence of...	<b>2</b> Progressing Towards Meeting Expected Competencies	<b>3</b> Meets expected competencies	<b>4</b> Often exceeds expected competencies	<b>5</b> Always exceeds expected competencies	<b>N/A</b> Not Applicable
<b>Work Ethics</b> <ul style="list-style-type: none"> <li>• Punctual</li> <li>• Honest and dependable, self-disciplined</li> <li>• Demonstrates positive attitude.</li> <li>• Demonstrates time management, stress management and ability to deal with change.</li> <li>• Accepts diversity and treats everyone with respect.</li> </ul>						
<b>Comments:</b>						



EXPECTED COMPETENCY		
<b>Confidentiality</b> <ul style="list-style-type: none"><li>Aware of the need for and maintains confidentiality at all times</li></ul>	Yes	No
<b>Comments:</b>		

Any areas that are ranked at “1 – Inappropriate or Absence of . . .” require a plan of action to remediate. After a probationary period of two months, re-evaluation will occur to ensure the desired improvements are evident.

**Plan of Action:**

**Re-evaluation Date:**

**Comments:**





**I have read this report and discussed it with my supervisor. I have received a copy.**

\_\_\_\_\_  
**Secretary**

\_\_\_\_\_  
**Principal**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Date**



**Formative Growth Plan Report (Optional)**

Name \_\_\_\_\_

School \_\_\_\_\_

Assignment \_\_\_\_\_

Date \_\_\_\_\_

<b>School Priorities</b>	<b>Principal Priorities</b>	<b>Employee Priorities:</b>

<b>Priority links</b>	<b>Outcomes</b>	<b>Strategies</b>	<b>Success Indicators</b>	<b>Results</b>
School				
Principal				
Employee				

\_\_\_\_\_  
Principal's signature

\_\_\_\_\_  
Employee's signature