

 LETHBRIDGE SCHOOL DIVISION

 402.11.2.16 Business Support Evaluation Form

# Section One Introduction

 Name

 Location

 Start Date for Current Position

 Evaluator (Principal/Vice Principal)

 Date

Reason for evaluation:

[ ]  Evaluation process for employees new to the Division (indicate period below).

 [ ]  6 Month Evaluation [ ]  10 Month Evaluation

[ ]  Employee request.

[ ]  Employee has not developed and implemented a Growth Plan.

[ ]  Employee may not be meeting the Support Staff Quality Standards.

# Section Two Support Staff Quality Standards Form

**In accordance with the expectations of the Business Support position, the employee will be evaluated within the following areas:**

* All areas should be marked as meeting (M) the standard, not meeting (N/M) the standard, or not applicable (N/A). For the purposes of this form, “meeting” describes job performance that meets the standard of performance in each area. Where areas of “not meeting” standards are identified, a comment must be made.
* All marked deficiencies must be accompanied by supporting documentation.

**RESPONSIBILITIES**

This position is responsible for providing support in regard to school financial and business operations. This is an analytical, problem solving and monitoring role.

M N/M N/A

[ ]  [ ]  [ ]  Responsible for the school’s accounting; including accounts payable,

accounts receivable, bank deposits, bank reconciliation and month end

financial statements, budget, purchasing and inventory control functions.

[ ]  [ ]  [ ]  Prepares standard and specialized financial reports and approves or

rejects specific transactions within established guidelines.

[ ]  [ ]  [ ]  Monitors activities and identifies issues and potential problems and either takes independent action or provides a recommendation to school administrative staff for resolution.

[ ]  [ ]  [ ]  Prepares year-end reports to submit to the Education Centre.

[ ]  [ ]  [ ]  Updates and implements all approved business policies and accounting

practices.

[ ]  [ ]  [ ]  Manages the collection and administration of all student fees.

[ ]  [ ]  [ ]  Maintains internal controls and safeguards for receipt of payments and

 communicates these controls to school administrators and staff.

[ ]  [ ]  [ ]  Resolves problems, explains requirements and obtains information from vendors, parents and service providers.

[ ]  [ ]  [ ]  Supports the Principal and Department heads in all areas of financial

duties such as tracking department budgets, running financial reports,

and reporting grant programs.

[ ]  [ ]  [ ]  Participates in annual budgeting and planning processes with school

administration.

[ ]  [ ]  [ ]  Monitor’s progress and changes in finance-related matters and informs school administration in a timely manner.

[ ]  [ ]  [ ]  Good organizational skills.

[ ]  [ ]  [ ]  Self-motivated.

[ ]  [ ]  [ ]  Portrays an approachable and optimistic demeanour.

[ ]  [ ]  [ ]  Carries out directions and duties as assigned.

COMMENTS:

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**2. PROFESSIONAL RESPONSIBILITES, JOB KNOWLEDGE AND COMMUNICATION**

M N/M

[ ]  [ ]  Specialized knowledge of accounting principles and complete knowledge of

school practices and Division policies related to functions supported.

[ ]  [ ]  Knowledge of both school administrative and program operations.

[ ]  [ ]  Required analytical and problem-solving skills and the ability to

balance diverse and, occasionally, conflicting demands.

[ ]  [ ]  Required working knowledge of office practices and procedures.

[ ]  [ ]  Work is performed with considerable independence within established policies

 and general objectives.

[ ]  [ ]  Knowledge of school administrative and program operations to develop and

 implement record keeping processes and systems.

[ ]  [ ]  Interacts positively with all staff.

[ ]  [ ]  Provide functional expertise to internal communities and may represent

the school interests within the Division.

[ ]  [ ]  External contacts extend to vendors, parents and service providers and involve

 resolving problems, explaining requirements, and obtaining information.

[ ]  [ ]  As per guidance from the Principal, liaises with the school’s financial institution(s)

and investment managers and allocates the schools’ finances accurately.

[ ]  [ ]  Works closely with Finance and Purchasing departments at the Education

Centre.

[ ]  [ ]  Demonstrates and models a genuine appreciation for, and understanding of

protocol, discretion, and professionalism in Lethbridge School Division.

[ ]  [ ]  Understands and efficiently utilizes the technologies used by the school and

Lethbridge School Division.

[ ]  [ ]  Embraces and models the use of contemporary and/or emerging technologies

 within Lethbridge School Division.

[ ]  [ ]  Actively engages in professional learning opportunities.

[ ]  [ ]  Collaborates with internal and external agencies to achieve the goals of the

department and Lethbridge School Division as a whole.

[ ]  [ ]  Promotes an atmosphere of mutual respect and appreciation for individual differences, all staff, students, families, and community members, regardless of

race, ethnicity, culture, gender, faith, nation, or spoken language, within the school division.

[ ]  [ ]  Promotes a welcoming, caring, respectful, and safe work environment.

[ ]  [ ]  Interpersonal relationships (with support staff, teachers, students, and the public; includes dealing with conflict).

[ ]  [ ]  Team player (with the support team, the school, the community, and the

 Division).

[ ]  [ ]  Demonstrate the ability to communicate effectively and appropriately.

[ ]  [ ]  Resolves conflict effectively. (Reference: [Employee Code of Conduct Appendix A 400.1](https://www.lethsd.ab.ca/download/187241))

[ ]  [ ]  Uses time effectively (include attendance, punctuality, setting of priorities,

 keeping to schedules).

[ ]  [ ]  Takes initiative (self-directed, takes charge of assigned tasks, requires minimum

 supervision).

 [ ]  [ ]  Excellent communication skills both in written and oral format.

[ ]  [ ]  Maintains confidentiality related to Division students and staff.

[ ]  [ ]  Proven public relations skills and demonstrated ability in promoting and

 maintaining effective working relations with public, students, co-workers, school

 staff, administration, and Division officials.

[ ]  [ ]  Maintains appropriate personal hygiene and appearance.

COMMENTS:

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**3. LEADERSHIP ABILITY, ENGAGEMENT AND DECISION MAKING**

M N/M

[ ]  [ ]  Collaborates with team members to identify efficient workflow in the school

office.

[ ]  [ ]  Functions in an expert/advisory role to administrative staff within the area of

 responsibility.

[ ]  [ ]  Acts in an advisory/expert role to school administrators to provide

information, interpret policies and resolve routine and non-routine problems.

[ ]  [ ]  May provide functional support to other school support staff within the

areas of responsibility.

[ ]  [ ]  Offers suggestions to supervisor(s) and other team members to

efficiently manage day to day tasks and assigned projects.

[ ]  [ ]  Takes initiative to identify efficient ways for managing the school’s resources.

[ ]  [ ]  Resolves challenging situations with guidance from the Principal or

Administrative team.

[ ]  [ ]  Promotes staff morale among Support staff to develop pride in work and

 accomplishment.

COMMENTS:

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**5. GOAL SETTING AND TIME MANAGEMENT**

[ ]  Attendance report attached.

M N/M

[ ]  [ ]  Organizes, prioritizes, and completes all tasks by assigned deadlines.

[ ]  [ ]  Provides timely response to requests by Lethbridge School Division staff,

students, and affiliated agencies.

[ ]  [ ]  Attends regularly, with no incidental (1-2 per month) absences or patterns of

 absences as demonstrated by the reviewed attendance report attached.

[ ]  [ ]  Is on time, ready to work with students at the assigned times.

[ ]  [ ]  Sets priorities in collaboration with administration.

[ ]  [ ]  Uses time effectively.

[ ]  [ ]  Follows assigned schedule.

COMMENTS:

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**6. Employee Safety/Health Management**

M N/M

[ ]  [ ]  Understand my role as an employee as it relates to Occupational Health and

Safety and comply with all legal requirements for safety and health, as they

pertain to the workplace.

[ ]  [ ]  Completes all Occupational Health and Safety training modules as provided by

the Division.

[ ]  [ ]  Reports hazardous conditions, near-misses and accidents both inside and

outside the Division to ensure the safety of Division staff and

community.

[ ]  [ ]  Completes accurate and timely reporting of employee incident, accident and

hazard reporting using Division-directed tools and procedures.

COMMENTS:

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# **7. DECISION**

 ☐ All areas are meeting position quality standards

 ☐ There are areas that are not meeting standards and/or;

 ☐ An improvement plan or remediation plan is implemented

 ☐ An additional evaluation will be provided if training is required

COMMENTS:

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# **8. EVALUATOR’S COMMENTS**

COMMENTS:

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# **9. EMPLOYEE’S COMMENTS**

COMMENTS:

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***As Principal, I have read and approve this evaluation.***

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 Principal’s Signature Date

After this evaluation has been signed by the principal, the below signatures are necessary:

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 Vice Principal’s Signature (if applicable) Date

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 Employee’s Signature Date

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 Reviewed by Human Resources Date

* Copy to Employee
* Copy to Principal/Vice Principal
* Original copy goes to Human Resources for employee’s file