 LETHBRIDGE SCHOOL DIVISION

 402.11.2.4 Clerical Support Non-Union Evaluation Form

 [ ]  **Executive Assistant** [ ]  **Administrative Professional to Director**

# Section One Introduction

 Name

 Location

 Start Date for Current Position

 Evaluator

 Date

*Reason for evaluation:*

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

 [ ]  4 Month Evaluation [ ]  7 Month Evaluation

[ ]  5 Year Evaluation for employee on continuing contract

[ ]  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 Clerical 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.

**LEGEND:**

**M Meeting Standard**

**N/M Not Meeting Standard**

**N/A Not Applicable**

**1. KEY RESPONSIBILITIES**

This position is responsible for performing duties requiring expertise in a program or functional area and involving the delivery or the operation of a program or specific function.

M N/M N/A

[ ]  [ ]  [ ]  Acts as a receptionist, taking messages or referring telephone calls

[ ]  [ ]  [ ]  Possesses a working knowledge of standard office practices and procedures

[ ]  [ ]  [ ]  Possesses knowledge of bookkeeping skills for tracking expenditures and reconciling and preparing standard financial reports (knowledge of budget codes)

[ ]  [ ]  [ ]  Possesses considerable knowledge of specific Division policies and procedures as well as external regulations/policies related to the program/functional area

[ ]  [ ]  [ ]  Possesses excellent organizational skills

[ ]  [ ]  [ ]  Is self-motivated; can work independently

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

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

[ ]  [ ]  [ ]  Coordinates meetings and workshops

COMMENTS:

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**2. PERSONAL/PROFESSIONAL QUALITIES**

M N/M N/A

[ ]  [ ]  [ ]  Interpersonal Relationships (with the Support staff, teachers, student(s), public; includes dealing with conflict)

[ ]  [ ]  [ ]  Team Player (with the Support team, the school, the community, and the Division)

[ ]  [ ]  [ ]  Demonstrates the ability to communicate effectively and appropriately

[ ]  [ ]  [ ]  Ability to resolve conflict effectively

[ ]  [ ]  [ ]  Use of time (include attendance, punctuality, setting of priorities, keeping to schedules)

[ ]  [ ]  [ ]  Initiative (self directed, takes charge of assigned tasks, requires minimum supervision)

[ ]  [ ]  [ ]  Personal Hygiene and Appearance

COMMENTS:

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**LEGEND:**

**M Meeting Standard**

**N/M Not Meeting Standard**

**N/A Not Applicable**

**3. POSITION REQUIREMENTS**

M N/M N/A

[ ]  [ ]  [ ]  Maintains up-to-date records and information

[ ]  [ ]  [ ]  Reviews, assesses and processes inquiries, documents and other records

[ ]  [ ]  [ ]  Provides and obtains routine information from the public or Division staff

[ ]  [ ]  [ ]  Possesses extensive knowledge of all programs in the Microsoft Office Suite

[ ]  [ ]  [ ]  Possesses exceptional keyboarding skills for entering and retrieving data

[ ]  [ ]  [ ]  Works with considerable independence making day to day operational decisions where policy/procedure has been outlined or where precedent has been set

[ ]  [ ]  [ ]  Resolves routine problems with the public, outside agencies, etc. by explaining related policies or procedures

[ ]  [ ]  [ ]  Performs related duties as required

COMMENTS:

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**4. SUPERVISORY SKILLS**

M N/M N/A

[ ]  [ ]  [ ]  Redirects a request or suggests alternative courses of action to resolve a problem when the answer is unknown

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

COMMENTS:

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**5. COMMUNICATION**

M N/M

[ ]  [ ]  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, student(s), co-workers, school staff, administration and Division officials

COMMENTS:

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**LEGEND:**

**M Meeting Standard**

**N/M Not Meeting Standard**

**N/A Not Applicable**

# **5. TIME MANAGEMENT**

[ ]  Attendance report attached and reviewed by evaluator(s)

M N/M

[ ]  [ ]  Attends regularly

[ ]  [ ]  Use of time (include attendance, punctuality, setting of priorities, keeping to schedules)

[ ]  [ ]  Sets priorities in collaboration with administration

[ ]  [ ]  Uses time effectively

[ ]  [ ]  Follows assigned schedule

COMMENTS:

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# **6. DECISION**

 [ ]  Recommend proceeding to 7 month probationary evaluation

 [ ]  Completes probationary process

 [ ]  Improvement plan implemented

 [ ]  Employee returns to Growth Plan process

 [ ]  Employee must submit a Growth Plan within one month

# **7. EVALUATOR’S COMMENTS**

COMMENTS:

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# **8. EMPLOYEE’S COMMENTS**

COMMENTS:

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***As Associate Superintendent or Director, I have read and approve this evaluation.***

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 Associate Superintendent or Director’s Signature Date

After this evaluation has been signed by the Associate Superintendent or Director, the following signatures are necessary upon review:

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 Employee’s Signature Date

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 Reviewed by Human Resources Date

* Copy to Employee
* Copy to Associate Superintendent or Director
* Original copy goes to Human Resources for employee’s file