 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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| --- |
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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