

SCHOOL DISTRICT OF GADSDEN COUNTY

SECRETARY II

PERFORMANCE APPRAISAL

Name _____ Position _____

School / Dept. _____ School Year _____

1. SERVICE DELIVERY

Category Definitions

- 1. Perform clerical duties required by activities and functions of the department / division including preparing and sending correspondence, receiving and routing incoming / outgoing mail and courier, setting up and maintaining files, handling personnel records and requests, preparing, processing and submitting required agenda items, applications, reports, forms, grants, records, minutes, guides, manuals and other assigned projects.
2. Perform financial duties required by the activities and functions of the department / division including preparing payroll, maintaining inventory, purchasing equipment and supplies, initiating and processing requisitions, assisting in preparation and maintenance of budget and other assigned projects.
3. Greet visitors and direct them to appropriate area.
4. Answer telephone, route and make calls, record messages, answer questions and provide information.
5. Maintain calendar for scheduling appointments, use of assigned facilities, interviews, deadlines, arrangements for meetings and department / division responsibilities.

Source Code (circle choices)

- A. Behavioral Event Interview B. Direct Documentation C. Indirect Documentation D. Training Programs Competency Acquisition E. Evaluatee Provided F. Confirmed Observation

Rating Code (circle one)

- Unsatisfactory Needs Improvement Effective Very Effective Outstanding

SECRETARY II (Continued)

2. EMPLOYEE QUALITIES / RESPONSIBILITIES

Category Definitions					
<p>6. Participate in training to update and expand clerical, financial, office practice and interpersonal skills.</p> <p>7. Maintain harmonious working relationship with others.</p> <p>8. Maintain good attendance, punctuality, and confidentiality.</p>					
Source Code <small>(circle choices)</small>					
A. Behavioral Event Interview	B. Direct Documentation	C. Indirect Documentation	D. Training Programs Competency Acquisition	E. Evaluatee Provided	F. Confirmed Observation
Rating Code <small>(circle one)</small>					
Unsatisfactory	Needs Improvement	Effective	Very Effective	Outstanding	

3. SYSTEM SUPPORT

Category Definitions					
<p>9. Provide stenographic support for professional staff utilizing typing, transcribing and computer skills.</p> <p>10. Prepare materials for dissemination to school, District staff, parents and community.</p> <p>11. Organize office to obtain maximum efficient operation.</p> <p>12. Oversee operation and maintenance of office equipment reporting malfunctions for necessary repairs.</p> <p>13. Collect and compile relevant data for audits, meetings and reports.</p> <p>14. Perform other duties as assigned.</p>					
Source Code <small>(circle choices)</small>					
A. Behavioral Event Interview	B. Direct Documentation	C. Indirect Documentation	D. Training Programs Competency Acquisition	E. Evaluatee Provided	F. Confirmed Observation
Rating Code <small>(circle one)</small>					
Unsatisfactory	Needs Improvement	Effective	Very Effective	Outstanding	

SECRETARY II (Continued)

SECRETARY II - WAREHOUSE

1. SERVICE DELIVERY

Category Definitions

1. Prepare and type purchase orders (negotiate best low prices available – delivered, or including freight / handling, as needed).
2. Receive items ordered, post inventory, reconcile purchase orders for payment and maintain files (software and paper).
3. Maintain inventory on AS-400 warehouse package for instructional, custodial, furniture and equipment purchase, receiving and distribution through an order system.
4. Provide order blank system for purchases through warehouse.
5. Verify / correct orders, upon receipt of orders, for posting / processing.
6. Prepare, submit and maintain payroll records for warehouse and SFS office.
7. Provide general secretarial / clerical services to Warehouse Foreman.
8. Operate office equipment.
9. Draft all correspondence from the Warehouse Foreman and submit to him for signature. Gather background information as requested.

Source Code (circle choices)

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|--------------------------------------|--------------------------------|----------------------------------|--|------------------------------|---------------------------------|
| A. Behavioral Event Interview | B. Direct Documentation | C. Indirect Documentation | D. Training Programs Competency Acquisition | E. Evaluatee Provided | F. Confirmed Observation |
|--------------------------------------|--------------------------------|----------------------------------|--|------------------------------|---------------------------------|

Rating Code (circle one)

- | | | | | |
|-----------------------|--------------------------|------------------|-----------------------|--------------------|
| Unsatisfactory | Needs Improvement | Effective | Very Effective | Outstanding |
|-----------------------|--------------------------|------------------|-----------------------|--------------------|

2. EMPLOYEE QUALITIES / RESPONSIBILITIES

Category Definitions

10. Maintain good attendance, punctuality, and confidentiality.
11. Maintain a cooperative working relationship with others.
12. Participate in training to update skills.

Source Code (circle choices)

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|--------------------------------------|--------------------------------|----------------------------------|--|------------------------------|---------------------------------|
| A. Behavioral Event Interview | B. Direct Documentation | C. Indirect Documentation | D. Training Programs Competency Acquisition | E. Evaluatee Provided | F. Confirmed Observation |
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Rating Code (circle one)

- | | | | | |
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| Unsatisfactory | Needs Improvement | Effective | Very Effective | Outstanding |
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SECRETARY II (Continued)

3. SYSTEM SUPPORT

Category Definitions

- 13. Maintain knowledge of bid process for preparing bids on consumable classroom supplies and paper, distribute to possible bidders. Record bid openings, tally bids (spreadsheet knowledge) and type recommendations of the Warehouse Foreman to the Superintendent and School Board.
- 14. Provide customer service to warehouse and back-up the Warehouse Foreman in his duties as necessary.
- 15. Assist food service and food service delivery men as needed, pick supply orders, handle inventory, unload semi-trucks, drive forklift, pick-up cases and inventory 70 – 100 pounds, use pallet jack (push / pull force).
- 16. Run errands and other duties as assigned by Warehouse Foreman.
- 17. Perform other duties as assigned.

Source Code (circle choices)

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Rating Code (circle one)

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| Unsatisfactory | Needs Improvement | Effective | Very Effective | Outstanding |
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SECRETARY II – EXCEPTIONAL STUDENT EDUCATION

1. SERVICE DELIVERY

Category Definitions

- 1. Establish and maintain files for exceptional students and personnel.
- 2. Release records in and out to County school and other agency.
- 3. Receive and make proper distribution of incoming telephone calls and other inquiries.
- 4. Assist in scheduling interdisciplinary and private school testing as assigned.
- 5. Provide record keeping and bookkeeping services as assigned.
- 6. Assist parents in the usage of available computer software; i.e., HANDS (Human Assistance Network Direction Service).
- 7. Perform general secretarial and receptionist duties for assigned personnel.
- 8. Handle purchase orders and mileage for all Exceptional Student Education (ESE) staff.

Source Code (circle choices)

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|--------------------------------------|--------------------------------|----------------------------------|--|------------------------------|---------------------------------|
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|--------------------------------------|--------------------------------|----------------------------------|--|------------------------------|---------------------------------|

Rating Code (circle one)

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|-----------------------|--------------------------|------------------|-----------------------|--------------------|
| Unsatisfactory | Needs Improvement | Effective | Very Effective | Outstanding |
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SECRETARY II (Continued)

2. EMPLOYEE QUALITIES / RESPONSIBILITIES

Category Definitions					
9. Maintain good attendance, punctuality, and confidentiality.					
10. Maintain a cooperative working relationship with others.					
11. Participate in training to update skills.					
Source Code <small>(circle choices)</small>					
A. Behavioral Event Interview	B. Direct Documentation	C. Indirect Documentation	D. Training Programs Competency Acquisition	E. Evaluatee Provided	F. Confirmed Observation
Rating Code <small>(circle one)</small>					
Unsatisfactory	Needs Improvement	Effective	Very Effective	Outstanding	

3. SYSTEM SUPPORT

Category Definitions					
12. Organize and maintain up-to-date catalogs and periodicals and media information for assigned personnel.					
13. Type purchase orders for assigned personnel and other itinerate teachers.					
14. Type and produce manuals, presentation materials and reports as requested.					
15. Assist in obtaining information relevant to exceptional students.					
16. Maintain an up-to-date calendar of program activities.					
18. Perform other duties as assigned.					
Source Code <small>(circle choices)</small>					
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Rating Code <small>(circle one)</small>					
Unsatisfactory	Needs Improvement	Effective	Very Effective	Outstanding	

SECRETARY II (Continued)

SECRETARY II - MAINTENANCE

1. SERVICE DELIVERY

Category Definitions					
<ol style="list-style-type: none"> 1. Type purchase orders. 2. Follow through on purchase orders. 3. Answer telephone and route messages to proper maintenance department. 4. Maintain calendar and schedule of work. 5. Prepare and handle all correspondence. 					
Source Code <small>(circle choices)</small>					
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Rating Code <small>(circle one)</small>					
Unsatisfactory	Needs Improvement	Effective	Very Effective	Outstanding	

2. EMPLOYEE QUALITIES / RESPONSIBILITIES

Category Definitions					
<ol style="list-style-type: none"> 6. Maintain good attendance, punctuality, and confidentiality. 7. Maintain a cooperative working relationship with others. 8. Participate in training to update skills. 					
Source Code <small>(circle choices)</small>					
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Rating Code <small>(circle one)</small>					
Unsatisfactory	Needs Improvement	Effective	Very Effective	Outstanding	

SECRETARY II (Continued)

3. SYSTEM SUPPORT

Category Definitions					
<p>9. Maintain required files. 10. Assist in budget procedures. 11. Perform other duties as assigned.</p>					
Source Code <small>(circle choices)</small>					
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4. WORKSITE SERVICE STANDARDS

Control Dimension					
<p>Student growth and achievement, the work ethic, fostering and developing professional image, collaboration and affirmative networking, systemic and systematic preparation for function delivery, interpersonal interaction, teammanship and communication skills, translating organizational purpose into observable behavior and others.</p>					
<p>(Special Note) An effective or higher rating is required in this job context category in order to be eligible for an overall effective or higher rating.</p>					
Source Code <small>(circle choices)</small>					
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Rating Code <small>(circle one)</small>					
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SECRETARY II (Continued)

5. ASSESSMENT AND OTHER SERVICES

Control Dimension

The use of the adopted performance appraisal system for instructional and other employees.
 The accurate and timely filing of all school reports.
 The completion of required professional development services.

(Special Note)

An effective or higher rating is required in this job context category in order to be eligible for an overall Effective or higher rating.

Source Code (circle choices)

- | | | | | | |
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Rating Code (circle one)

- | | | | | |
|----------------|-------------------|-----------|----------------|-------------|
| Unsatisfactory | Needs Improvement | Effective | Very Effective | Outstanding |
|----------------|-------------------|-----------|----------------|-------------|

OVERALL RATING: (enter total scores)

Input from parents and teachers was collected and analyzed in preparation of this report.

Unsatisfactory _____ Needs Improvement _____ Effective _____ Very Effective _____ Outstanding _____

Comments of the Evaluatee:

This evaluation has been discussed with me: Yes _____ No _____

Signature of Evaluatee **Date**

Comments of the Evaluator:

Signature of Evaluator **Date**