

SECRETARY, FEDERAL & STATE PROGRAMS
Summative Appraisal Form

Name _____ School Location _____

Appraisal Period: From _____ to _____ Date of Review _____

Directions

The following statements describe the employee who achieves success. Based on cumulative performance information, the evaluator estimates the employee's effectiveness in meeting each criterion. Rate each criterion using the scale below that most closely describes the employee's attainment of that criterion. For each domain, a comment area is provided for general statements and/or recommendations.

Rating Scale

- 5 Clearly Outstanding:** Performance is consistently far superior to what is normally expected.
- 4 Exceeds Expectations:** Performance demonstrates increased proficiency and is consistently above expectations.
- 3 Meets Expectations:** Performance meets expectations and presents no significant problems.
- 2 Below Expectations:** Performance is consistently below expectations and significant problems exist.
- 1 Unsatisfactory:** Performance is consistently unacceptable.
- 0 Not Applicable**

JOB PERFORMANCE STATEMENTS

Records, Reports, and Correspondence

- ____1. Initiates purchase orders for the Chief Instructional Officer, Title I Coordinator, Parent Community/Bilingual/ESL Coordinator, Private Non-Profit schools and assist with Migrant Services as needed.
- ____2. Initiates maintenance work orders for Annex II Building as needed for Federal and State Programs, Title I and Migrant Staff and ensure its completion.
- ____3. Prepares written correspondence forms, schedules, meeting agendas or reports using personal computer as needed for Federal & State Programs.
- ____4. Compiles, maintains and files all physical and computerized reports, records, correspondence and documents required when preparing various federal, state and local reports.
- ____5. Prepares campus communication as requested by Title I personnel.
- ____6. Maintains district calendar of events for the Federal and State Programs Chief Instructional Officer, Title I Coordinator and Parent/Community/Bilingual/ESL Coordinator.
- ____7. Maintains time and effort for the Chief Instructional Officer, Accountant Assistant, Parent Community/Bilingual/ESL Coordinator, Title I Coordinator, State Comp and District 211 funded employees.

- ____8. Assists Title Coordinator in compiling the results of HB5 components for school district; including the results of comments for Parental Surveys.
- ____9. Completes forms, and/or spreadsheets for the Chief Instructional Officer or other staff members as needed.
- ____10. Maintains absentee calendar for Title I and Migrant staff.
- ____11. Processes and maintains travel files for Title Staff and Private Non-Profit school employees.
- ____12. Oversees and maintains the Federal/State District deadline matrix and To Do List.
- ____13. Assists Parent/Community/Bilingual/ESL Coordinator with monthly Parent Accountability reports as it pertains to the Superintendent's Dashboard.
- ____14. Assists with Summer School purchases as they pertain to Title I funds.
- ____15. Verifies registration of parents attending Title I Adult Basic Ed classes.

COMMENTS: _____

Reception and Phones

- ____16. Processes and distributes incoming and outgoing mail for Federal and State Programs.
- ____17. Receives and greets visitors, answer incoming calls, take reliable messages and routes inquiries from parents, school personnel, outside agencies and the public to appropriate staff.
- ____18. Exhibits excellent communications and telephones skills while performing routine office duties.
- ____19. Assists Administrators, Principals, Teachers and Secretaries as needed.

COMMENTS: _____

Files

- ____20. Maintains physical and computerized files including inventory of school and office supplies, mailing lists, student records, visitor logs, and office communication.

COMMENTS: _____

Accounting and Inventory

- ____21. Performs routine bookkeeping tasks to maintain campus and department budget records, processes purchase orders from federal funds.
- ____22. Maintains, reviews and processes Staff Budget Worksheets for the districts Substitutes and processes Tutorial Timesheets for submission.

COMMENTS: _____

Other

- ____23. Participates in assigned professional development activities.
- ____24. Demonstrates initiatives and works independently.
- ____25. Monitors the work of campus secretaries, clerical aides, and parental aides as relates to the expenditure of federal funds.
- ____26. Monitors the use of supplies and equipment.
- ____27. Coordinates the repair and maintenance of office equipment.
- ____28. Performs other duties assigned by supervisor and other Federal & State Programs staff members.
- ____29. Maintains confidentiality of information.

COMMENTS: _____

Office Manager Responsibilities

- ____30. Maintains office efficiency by planning and implementing office systems, layouts, and equipment procurement.
- ____31. Deals with correspondence, complaints, and clients.
- ____32. Acts as liaison between staff, suppliers, and clients.
- ____33. Collaborates with other program secretaries to promote the success and cooperation of all programs.

COMMENTS: _____

What strengths does _____ possess?

What are some improvements _____ can make to ensure a higher degree of success for students on this campus/department?

