

**SECRETARY, EDUCATIONAL**  
Summative Appraisal Form

Name \_\_\_\_\_ 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**

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

**JOB PERFORMANCE STATEMENTS**

**Records, Reports, and Correspondence**

- \_\_\_\_1. Prepares written correspondence forms, schedules, or reports using typewriter or personal computer.
- \_\_\_\_2. Prepares instructional materials, meeting agendas, honor rolls, graduation lists, and campus communication as requested, using typewriter or personal computer.
- \_\_\_\_3. Maintains a daily teacher attendance log and records for substitute teachers.
- \_\_\_\_4. Monitors and processes personnel time records including leave requests and reports. Compiles information and submits to central office.
- \_\_\_\_5. Maintains a log of visitors to school.
- \_\_\_\_6. Maintains school calendar of events.
- \_\_\_\_7. Schedules meetings and appointments and maintains calendar for principal.

**COMMENTS:** \_\_\_\_\_

**Reception and Phones**

- \_\_\_\_8. Assists students, teachers, and parents as needed.
- \_\_\_\_9. Receives incoming calls, takes reliable messages, and routes to appropriate staff.

COMMENTS: \_\_\_\_\_  
\_\_\_\_\_

**Files**

- \_\_\_\_10. Maintains physical and computerized files including inventory of school and office supplies, mailing lists, student records, visitor logs, and office communication.
- \_\_\_\_11. Updates handbooks, policy manuals, and other documents as assigned.

COMMENTS: \_\_\_\_\_  
\_\_\_\_\_

**Accounting and Inventory**

- \_\_\_\_12. Receives, stores, and issues supplies and equipment.
- \_\_\_\_13. Performs routine bookkeeping tasks including simple arithmetic operations to maintain campus budget records.
- \_\_\_\_14. Prepares and makes cash deposits for activity account(s). Is responsible for maintenance of activity checkbook(s) and ledger(s).

COMMENTS: \_\_\_\_\_  
\_\_\_\_\_

**Other**

- \_\_\_\_15. Sorts, distributes, or delivers mail and other documents.
- \_\_\_\_16. Administers medication to students, checks temperatures, and notifies parents of student illness in nurse's absence.
- \_\_\_\_17. Performs other duties assigned by supervisor.
- \_\_\_\_18. Maintains confidentiality of information.

COMMENTS: \_\_\_\_\_  
\_\_\_\_\_

