



APPRAISAL PROCESS FOR SECRETARIAL STAFF & INFORMATION SERVICES TECHNICIANS

Procedures

1.0 Purpose

The performance appraisal procedure is instituted in order to:

- Assess performance and skill levels
- Monitor on-the-job progress
- Improve communication between a principal/supervisor and an employee
- Improve productivity
- Improve principal/supervisor awareness of the work being done
- Better understand organizational goals, objectives and strategies
- Identify development training needs
- Enhance work force planning
- Establish a model of accountability

2.0 Evaluation Procedure

Principal or supervisor provides an appraisal (Appendix A) of the COPE employee group (school secretaries, board secretaries, clerks, information services technicians).

Non-Probationary Employees

Employees will create a growth plan annually (Appendix B) to establish professional development goals. Performance Appraisals will occur every three years. The Principal/Supervisor may conduct additional performance appraisals as deemed necessary.

Probationary Employees

A performance appraisal will occur during the probationary period for each new employee.¹ Subsequent performance appraisals must occur once every three years. The Principal/Supervisor may conduct additional performance appraisals as deemed necessary.

Principals/Supervisors are responsible for signing and communicating evaluations. Principals/Supervisors will review the evaluation format with the employee in September of the year the evaluation is to take place, or upon hiring. Completed evaluations are to be shared with, and copied to, the employee. The original form is to be forwarded to Human Resources for placement in personnel files. Employees who disagree with their evaluation should bring their concerns to their immediate supervisor. An employee who still disagrees with an evaluation may

¹ COPE C.A. 2019-2022 - Article 13.03: "All new Permanent employees shall serve a probationary period of 420 hours. For new employees working less than half time, the probationary period will not exceed six months."

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appeal to the Superintendent of Human Resources in writing within seven days of receipt of the evaluation.

Employees who receive an unsatisfactory performance appraisal (receiving a Level 1 rating on one or more of the standards of performance) are required to meet with their principal/supervisor and complete the Improvement Plan (Appendix C). Employees who receive an unsatisfactory performance appraisal will follow the process as outlined in Appendix D.

3.0 Rating Scale

1. Satisfactory – Performance meets or exceeds expectations.
2. Unsatisfactory – Performance does not meet expectations. Performance improvement plan required.

Appendices

Appendix A: Secretarial & I.S. Technician Performance Appraisal

Appendix B: Secretarial & I.S. Technician Annual Growth Plan

Appendix C: Secretarial & I.S. Technician Improvement Plan

Appendix D: Process for Unsatisfactory Performance Appraisal

References



SECRETARIAL & I.S. TECHNICIAN PERFORMANCE APPRAISAL

Name: _____ Location: _____
Supervisor: _____ Date: _____

OBJECTIVE

Although daily assessment is a vital function of every principal/supervisor, a formal Performance Appraisal provides for a comprehensive discussion of overall employee performance.

Purposes of the review are many, but generally the exercise should address the following areas:

- To assess performance/skill levels
- To improve communication flow
- To define training needs

Performance appraisal steps:

1. Notification of employee being appraised: Within 20 days of the start of the school year, or within 20 days of being hired, if hired after the start of the school year.
2. Initial meeting: Arrange time to discuss the job description and past appraisals, if applicable.
3. Concluding meeting: Provide a minimum of 3 days' notice to set an uninterrupted meeting time in order to discuss the outcome of the appraisal, and sign off.

RATING SCALE

1. Satisfactory – Performance meets or exceeds expectation.
2. Unsatisfactory – Performance does not meet expectations. Performance improvement plan required. *There is no set formula for the overall rating. One unsatisfactory rating may or may not result in an overall rating of Unsatisfactory. The Principal/Supervisor should use their professional judgement in determining an overall rating.*

STANDARDS OF PERFORMANCE	RATING	
Job Knowledge & Skills		
Demonstrates an understanding of job duties and responsibilities as stated in the job description.	<input type="checkbox"/> Satisfactory	<input type="checkbox"/> Unsatisfactory
Understands the job's relationship with and impact on other functions within the organization.	<input type="checkbox"/> Satisfactory	<input type="checkbox"/> Unsatisfactory
Possesses the knowledge required to perform the job effectively.	<input type="checkbox"/> Satisfactory	<input type="checkbox"/> Unsatisfactory
Possesses the technical skills required to perform the job effectively.	<input type="checkbox"/> Satisfactory	<input type="checkbox"/> Unsatisfactory
Demonstrates an understanding of policies, procedures, statutes and regulations necessary to perform the job.	<input type="checkbox"/> Satisfactory	<input type="checkbox"/> Unsatisfactory
Formulates solutions effectively within the scope of the job.	<input type="checkbox"/> Satisfactory	<input type="checkbox"/> Unsatisfactory
Quality/Quantity of Work		
Completes work efficiently.	<input type="checkbox"/> Satisfactory	<input type="checkbox"/> Unsatisfactory
Produces the expected volume of work.	<input type="checkbox"/> Satisfactory	<input type="checkbox"/> Unsatisfactory
Demonstrates effective application of both technical and non-technical skills as required in the job description.	<input type="checkbox"/> Satisfactory	<input type="checkbox"/> Unsatisfactory

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Uses technology/resources available to achieve quality, service and productivity.	<input type="checkbox"/> Satisfactory	<input type="checkbox"/> Unsatisfactory
Interpersonal Skills		
Demonstrates the ability to work effectively with people at all levels in the organization, including community partners. (e.g., shows respect, understanding, sensitivity, courtesy, tact and flexibility).	<input type="checkbox"/> Satisfactory	<input type="checkbox"/> Unsatisfactory
Understands the role of listening in the communication process.	<input type="checkbox"/> Satisfactory	<input type="checkbox"/> Unsatisfactory
Provides and receives feedback effectively at all levels of the organization.	<input type="checkbox"/> Satisfactory	<input type="checkbox"/> Unsatisfactory
Maintains confidentiality at all levels of the organization.	<input type="checkbox"/> Satisfactory	<input type="checkbox"/> Unsatisfactory
Planning & Organization		
Demonstrates the ability to organize the workload efficiently and effectively.	<input type="checkbox"/> Satisfactory	<input type="checkbox"/> Unsatisfactory
Demonstrates the ability to establish and meet deadlines.	<input type="checkbox"/> Satisfactory	<input type="checkbox"/> Unsatisfactory
Demonstrates the ability to establish and meet short and long-term goals.	<input type="checkbox"/> Satisfactory	<input type="checkbox"/> Unsatisfactory
Possesses the flexibility to modify plans in order to meet changing needs and/or priorities.	<input type="checkbox"/> Satisfactory	<input type="checkbox"/> Unsatisfactory
Decision Making		
Recognizes when a decision is needed and demonstrates the ability to make a sound decision.	<input type="checkbox"/> Satisfactory	<input type="checkbox"/> Unsatisfactory
Evaluates known facts, develops a thoughtful plan of action, and follows through.	<input type="checkbox"/> Satisfactory	<input type="checkbox"/> Unsatisfactory
Recognizes when a higher authority should be consulted in respect to decision making.	<input type="checkbox"/> Satisfactory	<input type="checkbox"/> Unsatisfactory
Initiative		
Is a self-starter in seeking responsibilities, work, and new learning experiences.	<input type="checkbox"/> Satisfactory	<input type="checkbox"/> Unsatisfactory
Demonstrates the ability to work with minimal supervision.	<input type="checkbox"/> Satisfactory	<input type="checkbox"/> Unsatisfactory
Recognizes and acts on opportunities.	<input type="checkbox"/> Satisfactory	<input type="checkbox"/> Unsatisfactory
Innovation & Change		
Identifies, shares and is receptive to new ideas.	<input type="checkbox"/> Satisfactory	<input type="checkbox"/> Unsatisfactory
Adapts to new situations.	<input type="checkbox"/> Satisfactory	<input type="checkbox"/> Unsatisfactory
Helps others adapt to change.	<input type="checkbox"/> Satisfactory	<input type="checkbox"/> Unsatisfactory
Suggests new procedures to increase efficiency of the position/department.	<input type="checkbox"/> Satisfactory	<input type="checkbox"/> Unsatisfactory
Contributes new ideas and methods of dealing with problems.	<input type="checkbox"/> Satisfactory	<input type="checkbox"/> Unsatisfactory
Health & Safety		

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Demonstrates appropriate knowledge of health and safety practices/procedures in the workplace.	<input type="checkbox"/> Satisfactory	<input type="checkbox"/> Unsatisfactory
Follows all safety rules, practices and procedures.	<input type="checkbox"/> Satisfactory	<input type="checkbox"/> Unsatisfactory
Uses and maintains equipment properly.	<input type="checkbox"/> Satisfactory	<input type="checkbox"/> Unsatisfactory
Supports safety by keeping the workplace clean, organized and safe.	<input type="checkbox"/> Satisfactory	<input type="checkbox"/> Unsatisfactory
Teamwork		
Promotes and demonstrates trust, mutual respect and a co-operative work environment.	<input type="checkbox"/> Satisfactory	<input type="checkbox"/> Unsatisfactory
Balances the needs of the organization and team with one's own needs and desires.	<input type="checkbox"/> Satisfactory	<input type="checkbox"/> Unsatisfactory
Supports teamwork through open and honest communication.	<input type="checkbox"/> Satisfactory	<input type="checkbox"/> Unsatisfactory
Encourages and recognizes the contributions of others.	<input type="checkbox"/> Satisfactory	<input type="checkbox"/> Unsatisfactory
Offers assistance to others.	<input type="checkbox"/> Satisfactory	<input type="checkbox"/> Unsatisfactory
Demonstrates the ability to resolve conflict within the team.	<input type="checkbox"/> Satisfactory	<input type="checkbox"/> Unsatisfactory
Demonstrates reliability/dependability.	<input type="checkbox"/> Satisfactory	<input type="checkbox"/> Unsatisfactory

FINAL RATING:

<input type="checkbox"/> SATISFACTORY	<input type="checkbox"/> UNSATISFACTORY (Performance Improvement Plan required)
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EMPLOYEE COMMENTS (optional)

SUPERVISOR COMMENTS (optional)

Supervisor's Signature

Date: _____

Employee Signature

The employee acknowledges that they have received and read the appraisal.

Distribution

Original: Personnel File

Copies: Employee, Principal/Supervisor



SECRETARIAL & I.S. TECHNICIAN ANNUAL GROWTH PLAN

INSTRUCTIONS:

1. TO BE COMPLETED ANNUALLY
2. PARTS "A", "B" AND "C" ARE COMPLETED BY EMPLOYEE AND REVIEWED WITH PRINCIPAL/SUPERVISOR
3. PART "D" IS COMPLETED BY PRINCIPAL/SUPERVISOR AND REVIEWED WITH THE EMPLOYEE.

NAME: _____ DATE: _____

A – Specific Areas for Growth	
B – Growth Strategies & Resources	
C – Target Dates for Completion	
D – Overall Review and Suggestions	

Signature of Employee

Date

Signature of Principal/Supervisor

Date



SECRETARIAL & I.S. TECHNICIAN IMPROVEMENT PLAN
(Required for Unsatisfactory Performance Appraisals)

INSTRUCTIONS:

1. TO BE COMPLETED BY THE COPE EMPLOYEE AND PRINCIPAL/SUPERVISOR TOGETHER IN A COLLABORATIVE FASHION.

NAME: _____ **DATE:** _____

Area of Development	Goal(s)	Plan to Support Goals	Timeline

Signature of Employee

Date

Signature of Principal/Supervisor

Date



PROCESS FOR UNSATISFACTORY PERFORMANCE APPRAISAL



