

**WAKULLA COUNTY SCHOOL BOARD
COMPREHENSIVE ASSESSMENT FORM SUMMARY**

SUPPORT PERSONNEL

Name _____ Position **SECRETARY – BOOKKEEPER**

School / Dept _____ School Year _____ EIN # _____

JOB CONTEXT SERVICE CATEGORY	Needs				
	Outstanding	Exemplary	Effective	Improvement	Unsatisfactory
1. SERVICE DELIVERY	<input type="checkbox"/> 30	<input type="checkbox"/> 28	<input type="checkbox"/> 26	<input type="checkbox"/> 18	<input type="checkbox"/> 0
2. INTER/INTRA – AGENCY COMMUNICATION AND DELIVERY	<input type="checkbox"/> 16	<input type="checkbox"/> 14	<input type="checkbox"/> 12	<input type="checkbox"/> 6	<input type="checkbox"/> 0
3. EMPLOYEE QUALITIES/RESPONSIBILITIES	<input type="checkbox"/> 18	<input type="checkbox"/> 16	<input type="checkbox"/> 14	<input type="checkbox"/> 7	<input type="checkbox"/> 0
4. SYSTEM SUPPORT	<input type="checkbox"/> 18	<input type="checkbox"/> 16	<input type="checkbox"/> 14	<input type="checkbox"/> 7	<input type="checkbox"/> 0
5. WORKSITE SERVICE STANDARDS	<input type="checkbox"/> 18	<input type="checkbox"/> 16	<input type="checkbox"/> 14	<input type="checkbox"/> 7	<input type="checkbox"/> 0
Totals:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Overall Rating

Information from the comprehensive feedback summary was collected and analyzed in the preparation of this report.

Outstanding 100 – 94 Exemplary 93 – 86 Effective 85 – 75 Needs Improvement 74 – 65 Unsatisfactory 64 - 0

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

**WAKULLA COUNTY SCHOOL BOARD ANNUAL
PERFORMANCE APPRAISAL**

SECRETARY – BOOKKEEPER

Name _____ Position _____

School / Dept. _____ School Year _____

1. SERVICE DELIVERY

Category Definitions

1. Perform clerical duties required by activities and functions of the workplace, 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. Greet visitors and direct them to appropriate areas.
3. Prepare materials for dissemination to schools, District staff, parents and the community.
4. Oversee operation and maintenance of office equipment, reporting malfunctions for necessary repairs.
5. Maintain and/or process all files in an alphabetical or chronological system.
6. Obtain, assemble and organize pertinent data into usable form for local state and federal audits.
7. Perform financial duties required by the activities and functions of the workplace, including initiating and processing requisitions, assisting in preparation and maintenance of budget and other assigned projects.
8. Make arrangements for meetings and conferences.
9. Provide miscellaneous clerical services for various boards and committees on which designated supervisors serve.
10. Perform additional duties specific to the department / program.
11. Perform bookkeeping functions of internal accounts, school budget, accounts payable and petty cash.
12. Prepare, process and follow-up on all purchase orders as authorized.
13. Receive and distribute merchandise resulting from purchase orders.
14. Receive and distribute monies from various accounts within the school's internal accounts and maintain appropriate documentation.
15. Prepare, process and record all bank deposits and withdrawals.
16. Prepare appropriate materials and items for athletic events and/or other school activities as required.
17. Prepare and submit budget adjustments and amendments as needed.
18. Complete other office duties as assigned.

Source Code (Check Choices) A. Direct Documentation B. Indirect Documentation C. Training Programs Competency Acquisition D. Evaluatee Provided E. Confirmed Observation

Rating Code (Check One) Outstanding 30 Exemplary 28 Effective 26 Needs Improvement 18 Unsatisfactory 0

2. INTER/INTRA - AGENCY COMMUNICATION AND DELIVERY

Category Definitions

19. Sort and distribute mail and other memoranda.
20. Assist public by answering routine questions, scheduling appointments and completing forms.
21. Answer the telephone in a courteous and professional manner.
22. Answer inquiries about the department / program, forwarding to the appropriate personnel when necessary.
23. Communicate effectively with the public, co-workers and administration.
24. Respond to inquiries and concerns in a timely manner.
25. Keep supervisor informed of potential problems or unusual events.

Source Code (Check Choices) A. Direct Documentation B. Indirect Documentation C. Training Programs Competency Acquisition D. Evaluatee Provided E. Confirmed Observation

Rating Code (Check One) Outstanding 16 Exemplary 14 Effective 12 Needs Improvement 6 Unsatisfactory 0

Name _____

Position _____

3. EMPLOYEE QUALITIES/RESPONSIBILITIES

Category Definitions

- 26. Demonstrate initiative in the performance of assigned responsibilities.
- 27. Model and maintain high ethical standards.
- 28. Follow attendance, punctuality and proper dress rules.
- 29. Maintain confidentiality.
- 30. Maintain positive relationships with co-workers, school personnel, parents and administration.
- 31. Participate in workshops and training sessions as required .

Source Code (Check Choices) A. Direct Documentation B. Indirect Documentation C. Training Programs Competency Acquisition D. Evaluatee Provided E. Confirmed Observation

Rating Code (Check One) Outstanding 18 Exemplary 16 Effective 14 Needs Improvement 7 Unsatisfactory 0

4. SYSTEM SUPPORT

Category Definitions

- 32. Provide typing, filing, duplicating, inventory, record keeping and other general clerical duties for other personnel as directed by the supervisor or required by School Board policy.
- 33. Perform data entry as necessary.
- 34. Prepare all required reports and maintain all appropriate records.
- 35. Follow all School Board policies and school policies and procedures.
- 36. Exhibit the interpersonal skills necessary as an effective team member.
- 37. Demonstrate support for the School District and its goals and priorities.
- 38. Perform other incidental tasks consistent with the goals and objectives of the District and this position.

Source Code (Check Choices) A. Direct Documentation B. Indirect Documentation C. Training Programs Competency Acquisition D. Evaluatee Provided E. Confirmed Observation

Rating Code (Check One) Outstanding 18 Exemplary 16 Effective 14 Needs Improvement 7 Unsatisfactory 0

5. WORKSITE SERVICE STANDARDS

Category Definitions

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.

(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 (Check Choices) A. Direct Documentation B. Indirect Documentation C. Training Programs Competency Acquisition D. Evaluatee Provided E. Confirmed Observation

Rating Code (Check One) Outstanding 18 Exemplary 16 Effective 14 Needs Improvement 7 Unsatisfactory 0