

**SECRETARY, MAINTENANCE/JOB CONTROLLER  
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, Correspondence and Dispatch**

- \_\_\_\_1. Prepares correspondence, memorandums, forms, requisitions, and reports for maintenance office.
- \_\_\_\_2. Receives and processes work orders and emergency requests for service.
- \_\_\_\_3. Compiles pertinent data to prepare various required state and local reports.
- \_\_\_\_4. Maintains physical and computerized departmental files, including preventive maintenance data and work orders.
- \_\_\_\_5. Keeps up-to-date files for all department employees.
- \_\_\_\_6. Dispatches maintenance personnel as needed for district repairs.
- \_\_\_\_7. Tracks and records personnel locations during normal working hours.

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

**Phones**

- \_\_\_\_ 8. Answers incoming calls, takes messages, and routes them to appropriate staff; handles questions and requests that fall within level of responsibility.

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

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**Accounting**

- \_\_\_\_ 9. Performs routine bookkeeping tasks, including simple arithmetic operations to maintain department budget records.
- \_\_\_\_ 10. Assists with preparation of purchase orders and payment authorizations.
- \_\_\_\_ 11. Assists in compiling and reporting time records, including leave requests and reports, and prepares payroll on employees.

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

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**Data Entry**

- \_\_\_\_ 12. Inputs maintenance work orders completed and scheduled into computer
- \_\_\_\_ 13. Inputs all contracted services completed and scheduled into computer

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

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**Other**

- \_\_\_\_ 14. Assists in ordering office supplies for department.
- \_\_\_\_ 15. Welcomes all visitors and handles their requests or refers them to appropriate personnel.
- \_\_\_\_ 16. Maintains effective rapport with general public and handles any problems or concerns in a prompt and courteous manner.
- \_\_\_\_ 17. Maintains (IPM) Integrated Pest Management record according to state and federal guidelines
- \_\_\_\_ 18. Maintains (IAQ) Indoor Air Quality records in order to provide reports and information on district air quality questions or concerns.
- \_\_\_\_ 19. Maintains Contractor and Construction information in order to provide reports and information for budget review and preparation
- \_\_\_\_ 20. Follows and abides by School Board and Maintenance Department policies and procedures.
- \_\_\_\_ 21. Maintains a schedule of appointments and makes arrangements for conferences and interviews.
- \_\_\_\_ 22. Performs other duties as assigned by supervisor.

\_\_\_\_23. Maintains confidentiality of information.

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

\_\_\_\_\_

**Safety**

\_\_\_\_24. Operates tools, equipment, and machinery according to prescribed safety procedures.

\_\_\_\_25. Follows established safety procedures and techniques to perform job duties, including lifting, climbing, etc.

\_\_\_\_26. Corrects unsafe conditions in work area and reports any conditions that are not correctable to supervisor immediately.

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

\_\_\_\_\_

What strengths does \_\_\_\_\_ possess?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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

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\_\_\_\_\_

Summative Conference Comments:

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