

**SECRETARY, COUNSELOR  
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. Performs general office work such as record-keeping, computer/typing, and using the copier machines.
- \_\_\_\_2. Answers and routes telephone calls, relays messages to counselors and other offices, makes appointments for parent conferences and college representatives, etc.
- \_\_\_\_3. Keeps records and appointments for counselors.
- \_\_\_\_4. Greets students and directs them to proper counselor.
- \_\_\_\_5. Collects and distributes mail to appropriate counselor and places testing labels/appropriate paperwork in students' cumulative folders.
- \_\_\_\_6. Files personal data folders and other records as requested by the counselors.
- \_\_\_\_7. Maintains current enrollment, withdrawal and record requests log.
- \_\_\_\_8. Maintains student guidance/enrollment cards.
- \_\_\_\_9. Computerizes class lists, teacher assignments, etc for the testing programs as assigned.
- \_\_\_\_10. Supervises and instructs students on the use of computer system for college programs.

- \_\_\_\_11. Keeps and updates as assigned all special population files such as LEP, GT, Special Education, etc.
- \_\_\_\_12. Generates student failure report to distribute to teachers.
- \_\_\_\_13. Generates honor roll report for publication.
- \_\_\_\_14. Assists with student orientation sessions.
- \_\_\_\_15. Distributes all report cards.
- \_\_\_\_16. Tracks the grades of all students placed in an alternative program.
- \_\_\_\_17. Keeps attendance and monitors office student aides.
- \_\_\_\_18. Collects fees for PSAT and other testing programs.

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

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**Reception and Phones**

- \_\_\_\_19. Conducts initial interview with students, teachers, and parents as needed.
- \_\_\_\_20. Receives incoming calls, takes reliable messages, and routes to appropriate staff. Makes appointments for parent conferences and college representatives, etc.

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

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**Files**

- \_\_\_\_21. Maintains physical and computerized files, mailing lists, student records, visitor logs, and office communication.
- \_\_\_\_22. Updates standard operating procedure handbooks, policy manuals, and other documents as assigned.

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

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**Other**

- \_\_\_\_23. Sorts, distributes, or delivers mail and other documents.
- \_\_\_\_24. Performs other duties assigned by supervisor.
- \_\_\_\_25. Maintains confidentiality of information.

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

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

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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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**Recommendation of Evaluator:** I have read and received a copy of this evaluation. I have reviewed this instrument.

- Renewal and/or Extension of Assignment
- Non-renewal of Assignment
- Termination of Assignment
- Non-extension of Assignment

\_\_\_\_\_  
Administrator (Print Name)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Administrator's (Signature)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Employee's Signature

\_\_\_\_\_  
Date