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The development of a performance evaluation system for educational secretaries

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The development of a performance evaluation system
for educational secretaries

by

Patrick Daniel Bird

A Dissertation Submitted to the
Graduate Faculty in Partial Fulfillment of the
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For the Graduate College

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CHAPTER I. INTRODUCTION

Most educational institutions evaluate the qualifications and work of at least some of their personnel, specifically in the areas of certification, selection, assignment, promotion, award of tenure, and in some cases, to determine who might receive an extra financial reward (Stufflebeam & Sanders, 1986; Cascio, 1982; Fox & Egan, 1982; Heneman, Schwab, Fossum, & Dyer, 1983). Stufflebeam (1986) asserts that "Professional educators, throughout the world, must evaluate their work in order to 1) obtain direction for improving it and 2) document their effectiveness." Strong and Helm (1991) argue that evaluation of school personnel serves the purpose of measuring whether or not an employee has met his or her objectives in relationship to the mission of the school. They suggest that effective evaluation is designed to improve instruction and provide for professional development. Look and Manatt (1984) note that evaluation of school personnel is important in relationship to the public's demand for increased accountability.

However, until recently, there was widespread dissatisfaction with the amount and quality of personnel evaluation in education, and many agreed that there was a need to improve the overall quality of personnel evaluation in education. Community groups, school boards, and educators would often complain about the near absence of personnel evaluation in their schools or the superficiality and lack of depth in the systems that did exist (Darling-Hammonds, Wise, & Pease, 1983).

In the early 1980s many national publications pointed out shortcomings in education which indirectly implied that there was a need for improving evaluation of public school personnel (Boyer, 1983; Goodlad, 1983; A Nation at Risk, 1983; Educating Americans for the 21st Century, 1982; Making the Grade, 1983).

Efforts in the 1970s and '80s to improve the evaluation of educational personnel focused primarily on teachers and administrators (Manatt, 1989; Goldhammer, Anderson, Krajewski, 1980; Brophy, 1979; Look & Manatt, 1984; Manatt, Palmer, & Hidlebaugh, 1976;; Hunter, 1979, 1980; McGreal, 1983; Stow & Manatt, 1982; Wuhs & Manatt, 1983; Wise, Darling-Hammond, McLaughlin, & Bernstein, 1984).

Some researchers have studied and created criteria and/or instruments to evaluate educational support personnel (Holzman, 1992; Stronge & Helm, 1991; Van Gorp, 1993; Manatt & Brown, 1978).

Studies involving educational secretaries have been limited. Casanova (1985, 1991), Crimm (1985), Hales and Hyder (1971), Hart (1985), Havelock (1973), Johnson (1984), Lyons (1974), Mann (1980), Rentschler (1983), Rimer (1984), and Sweeney (1986) have studied the various roles, duties, and responsibilities of the school secretary. Casanova (1985, 1991), Cooper (1979), Gittler (1993), and Reynolds and Tramel (1971) have studied the importance and value of the school secretary. Banach (1988), Chirco (1981), and Gittler (1992) have surveyed the attitudes and feelings of secretaries in relationship to job satisfaction. Fried's (1988) research on secretaries focused on pay. Fry (1991) and Moseley-Hennebach (1989) have suggested that secretaries need more training.

Banach (1989), Casanova (1991), Charlton (1983), and Finch (1983) discuss the relationship between the boss and secretary and the implications it has in terms of productivity in the organization. Casanova (1991) studied the historical development of the educational secretary since the inception of public education in the late 19th century.

Perhaps Moore (1985) has come the closest to researching performance evaluation for secretaries; however, her work is focused on secretaries in colleges and universities. Eisman (1990) has published suggestions on the criteria that should be used to evaluate a secretary in the business setting. Otherwise, there has been very little if any research on educational secretary evaluation. Perhaps Fried (1988) sums up the need for educational secretarial evaluation when she says, "In light of emerging trends, it has become increasingly clear that the traditional method of secretarial job evaluation may no longer be appropriate."

Statement of the Problem

Knowing why school personnel are evaluated, what a secretary does, what his/her role is, why secretaries should be trained, and knowing that having standards and criteria in evaluation of personnel are all important. However, if the value of the school secretary has been established and the value of evaluating school personnel is important, then why haven't researchers established an evaluation system for educational secretaries? Would establishing a system for evaluating the school secretary be beneficial?

Also, it is very important to answer this question: How does secretary evaluation relate to instruction? Research has suggested that the principal is the instructional leader in the school (Edmonds, 1982). Does the effective educational secretary allow for or assist the principal in being a more effective instructional leader? Does the work of the educational secretary assist teachers in meeting the needs of students?

The problem for this study is to:

1. identify the roles and responsibilities of the educational secretary;
2. determine specifically what tasks the secretary performs each day on the job on a regular basis;
3. determine the activities the school secretary performs that are critical to the school's success toward achieving progress toward its mission;
4. establish the criteria to evaluate the school secretary;
5. make suggestions on the model to use when evaluating the school secretary;
6. determine if job descriptions actually align with the activities the secretary performs;
7. determine if there is a need to develop separate criteria for the different secretarial positions within the educational setting;

8. determine if certain activities performed by educational secretaries are seasonal because of the cycle of the academic year;
9. propose adequate steps in conducting the summative evaluation; and
10. determine if there is a relationship between the secretary's amount of time spent in managerial tasks with the amount of time the building level principal can spend in instructional related activities.

Purpose of the Study

Given the lack of research on the performance evaluation of the educational secretary, the purpose of this study is to analyze and compare data obtained through observations, interviews, and written documents to answer questions regarding the development of an evaluation system that could be used by all K-12 schools and intermediate educational agencies that employ secretaries.

Objectives of the Study

This research study had the following objectives.

1. Build a comparison chart of critical work activities (CWAs) for a data base and build norms.
2. Identify critical work activities (CWAs) for each secretarial position in public schools or educational support agencies.

3. Find the most important 15 to 20 activities the secretary does in her work.
4. Identify job titles for all secretarial positions in public schools or educational support agencies.
5. Design and establish criteria for procedures.
6. Design a prototype summative evaluation report consistent with the job description for each secretarial position in public schools or educational support agencies.
7. Design an evaluation cycle.
8. Design a model for the complete process of evaluating the educational secretary.
9. Compare the amount of time the secretary spends on certain activities and how that time relates to the amount of time his/her superintendent or principal spends on instructional related activities.

Research Questions

Qualitative methodology used in these case studies does not typically lend itself to the testing of hypotheses in the traditional form as it would in quantitative research. After reviewing the School Improvement Model (SIM) and its process in working with the members of this case study, the following research questions were raised.

1. What are the purposes of secretary evaluation?
2. What are the criteria for secretary evaluation?
3. How high are the standards?

4. How should secretary performance be monitored and reported?
5. What methods can be used to help secretaries improve, upon finding their strengths and weaknesses?
6. How much training does it require?

Basic Assumptions

The basic assumptions of this study included the following.

1. Individual secretaries recorded timelogging information accurately.
2. Individual secretaries recorded timelogging information independent of other secretaries.
3. Critical work activities were identified by secretaries based on the importance to the position rather than on the amount of time spent on the activities.
4. Job specific responsibilities are representative of all employees in any given secretarial position in the school district or educational support agency.
5. The sample of educational secretaries is representative of other educational secretarial positions across the United States.
6. Better secretarial performance relates to better overall education for students.

Delimitations

The following delimitations define this investigation.

1. Only K-12 and intermediate unit secretaries will be involved in the study.
2. Only the years of 1990-1994 will be involved in the study.
3. Behavior will be limited to those identified by CWA timelogging, interviews, and existing job descriptions.
4. The positions will be limited to building secretaries and those employees who work in intermediate agencies or central offices with the job title of secretary or clerk.
5. All behaviors examined will be limited to those identified by the methodology in item #4 above. No direct observation will be involved.
6. This study is limited to the following educational agencies:
Fremont County School District #2, Dubois, Wyoming; Lincoln County School District #1, Diamondville, Wyoming; Basehor-Linwood School District #458, Basehor, Kansas; Western Hills AEA 12, Sioux City, Iowa.

CHAPTER II. REVIEW OF THE LITERATURE

As a result of the accountability movement of the 1970s, many states mandated that all certificated school personnel, not just teachers, be evaluated. Unfortunately, the reality of those mandates was often that professional support personnel were evaluated using either informal or inappropriate criteria extrapolated from those used with teachers (Stronge, Helm, & Tucker, 1993). Coupled with this is the fact that there has been extensive research in performance evaluation of school personnel. However, this research has not included performance evaluation of educational secretaries. The research on educational secretaries has generally focused on the historical development of the secretary, job characteristics, job responsibilities, how secretaries feel about their job, secretarial pay, job training, the value of the secretarial position in schools, and trends in the secretarial field.

Therefore, this review of literature will focus on five areas: methods of the review of literature, literature related to a general survey of performance evaluation in education, literature related to educational secretaries, related research, and literature explaining what qualitative research is.

Methods of the Literature Review

The following steps were used to conduct the review of the literature investigation:

1. An Education Resource Information Center (ERIC) search was conducted which included data bases from Current Index to Journals in Education (CIJE), and Resources in Education (RIE). Key words used included secretary, secretaries, evaluation, appraisal, performance appraisal, work activities, and duties. All of these words were used in various combinations. The search covered the years from 1966 to 1993. When evaluation was selected as a descriptor, it generated approximately 125,000 titles; when secretary was used to modify, it generated zero titles. There were 43 titles generated using just secretary.
2. A computer search of Dissertation Abstracts, 1982 to 1993, found no direct information concerning evaluation of K-12 secretaries; however, information concerning secretarial duties was found.
3. A computer search of ABI Inform, a business data base, was conducted. Secretaries received 1,672 titles; zero when evaluation or performance appraisal was entered as a modifier.
4. The Iowa State University indexes, including Social Science, Humanities, and Business, were searched. Again, little was found that specifically related to secretary evaluation or secretary appraisal.
5. A search of Educational Administration Abstracts was conducted and no information pertaining to secretary evaluation or secretary appraisal was found.

Performance Evaluation in Education

The public's demand for increased accountability in the educational system as a whole has led to various program and personnel evaluations (Stufflebeam, 1987; Look & Manatt, 1984). Before reviewing the purpose, standards, characteristics, trends, components, and models of performance evaluation, it seems logical to define what performance evaluation is. Stronge and Helm (1991) suggest that evaluation is directly linked to the mission of the organization. Performance in essence must come about as the individual strives to meet the goals and objectives of the organization. Stufflebeam (1987) sums up the definition of evaluation by saying:

Evaluation means the systematic investigation of the worth or merit of some object. The object of an evaluation is what one is examining (or studying) in and evaluation: a program, a project, instructional materials, personnel qualifications and performance, or student needs and performance. (p. 127)

Purpose of performance evaluation

Personnel evaluations are pervasive in educational institutions as one part of a total system designed to support and assure excellent service by educators (Andrews, 1985; Bridges & Groves, 1984). Some institutions, but far too few, use evaluation as a means to provide feedback for improving the performance of educational personnel (Darling-Hammond, Wise, & Pease, 1983; Deal, Newfield, & Rallis, 1982; McGreal, 1983). Others use evaluation as a means to determine which teachers or other personnel deserve some type of bonus or merit pay. Contrary to this, evaluation is used to eliminate employees who have continued to

perform poorly (Rebore, 1991). It has also been suggested that evaluation may serve the purpose of meeting state legal requirements (Look & Manatt, 1984). From an instructional point of view, Hickcox (1982) suggests that the purpose of evaluation is to improve instruction or the process of teaching and learning.

Rebore (1991) summarizes the following as reasons for evaluation:

1. fosters the self-development of each employee;
2. helps to identify a variety of tasks that an employee is capable of performing;
3. helps to identify staff development needs;
4. helps to improve performance;
5. helps to determine if an employee should be retained in the organization and how large a salary increase he or she should be given;
6. helps to determine the placement, transfer, or promotion of an employee. (p. 192)

Standards of performance evaluation

Criteria for performance evaluation were already being established by researchers in the 1970s. Manatt, Palmer, and Hidlebaugh (1976) defined criteria for teacher evaluation that apply to all types of personnel evaluation. They concluded that performance evaluation must be valid, observable, reliable, and legally discriminating. A uniting between performance evaluation and evaluation of the entire educational process was developed in the 1980s. Stufflebeam (1987) suggested that a good program evaluation must have personnel evaluation as part of it. He asserted that program evaluation and personnel evaluations are logically linked. He implied that neither method was worthy unless it had an impact on the results of student learning.

To have an effective evaluation system for educational personnel, one must set standards or criteria. "The need for standards for judging personnel evaluations in education stems from the inevitable and vitally important role of personnel evaluation" (Stufflebeam & Sanders, 1986). Prior to 1984, standards for personnel evaluation were not published. The crux of the problem was that the professionals of education and evaluation could not agree on what standards should be used to judge personnel evaluation systems. As a result of this dilemma, the Joint Committee of Program Evaluation was formed to establish the standards that should be used to evaluate effective educational programs. The committee was composed of various experts specializing in educational program evaluation, various experts specializing in personnel evaluation, representatives from the American Federation of Teachers, and representatives from the American Association of School Administrators. A number of factors were included in the decision to form this committee:

- 1) Personnel evaluation in education was greatly in need of improvement;
- 2) they saw it as urgent because of the increased number of evaluation systems being marketed and because of increased litigation;
- 3) they believed that the major teacher organizations would support having professional standards (Stufflebeam & Sanders, 1986).

The committee findings suggested that performance evaluation of personnel meet the following standards: propriety, utility, feasibility, and accuracy (Stufflebeam, 1987). These findings aligned with the Joint Committee on Standards for Educational Evaluation (1981) which suggested

that all types of educational evaluation meet those standards.

Stufflebeam (1987) defines these standards as follows:

Utility standards - In general, the utility standards are intended to guide evaluations so that they will be informative, timely, and influential. These standards require evaluators to acquaint themselves with their audiences, earn their confidence, ascertain the audience information needs, gear evaluations to respond to these needs, and report the relevant information clearly and when it is needed. Overall, the standards of utility are concerned with whether an evaluation serves the practical information needs of a given audience.

Feasibility standards - recognize that an evaluation usually must be conducted in a natural, as opposed to a laboratory setting, and require that no more materials and personnel time than necessary be consumed. Overall, the feasibility standards call for evaluations to be realistic, prudent, diplomatic and frugal.

Propriety standards - reflect the fact that evaluations affect many people in different ways. These standards are aimed at ensuring that the rights of persons affected by an evaluation will be protected. These standards require that those conducting evaluations learn about and abide by laws concerning such matters as privacy, freedom of information, and protection of human subjects. Propriety standards require that evaluations are conducted legally and ethically.

Accuracy standards - determine whether an evaluation has produced sound information. These standards require that the obtained information be technically adequate and that conclusions be linked logically to the data. (pp. 128-129)

Characteristics of performance evaluation

Exemplary evaluation systems of school personnel have certain characteristics. The evaluation system should address questions or goals of the organization, purpose and usefulness, legal issues, and the alignment of employee job responsibilities and organizational philosophies (Van Gorp, 1993). In addition, Manatt, Palmer, and Hidlebaugh (1976) suggest that in personnel performance evaluation, three questions must be answered: What are to be the criteria of successful

performance? How high shall the standards be? How shall performance be measured and reported? (p. 23). Another characteristic of a performance evaluation system is its usefulness. A good performance evaluation system must have a desirable impact on the target population. The assessments must discern those aspects of the system that require change to yield the desired results (Stufflebeam, 1987).

Legal issues must be discussed further as specific legal issues must be considered in designing a performance evaluation system that protects the due process rights of those being evaluated. Manatt (1987) discusses due process by stating that the evaluator must meet the following criteria when working with a marginal employee: The evaluator must first notify the employee of what is wrong, or what is lacking in performance; he must explain how to perform up to standards; he must assist the employee and he must provide time for the employee to improve. Furman (1987) suggested the following due process rights:

1. the right to know what standards of performance are expected;
2. the right to notice and feedback;
3. the right to a chance to improve;
4. the right to help to improve; and
5. the right to sufficient time to carry out prescribed improvement in a non-threatening environment. (p. 77)

Trends in performance evaluation

Performance evaluation has changed throughout the last three decades as has the education system as a whole. As we move more and more into the age of information, educators are almost overwhelmed with research and data on how to improve schools and the evaluation of employees. Much

of the information published one week reflects in similarity of previous information; however, information sources often contradict each other.

The big movement in the early 1980s was to define effective schools. Edmonds (1982) deemed schools effective if they appeared to have the following: instructional leadership of the principal, a school focused on instructional improvement, a climate that was safe and orderly, a faculty that emphasized high expectations of all students, and a school that used measurement to determine program effectiveness and set goals. At the same time, most evaluation systems for education were clinical in nature. Recently, Senge's (1993) research on systems thinking has influenced progressive organizations' thinking. Senge suggests that all organizations are more influenced by the way the system is set up than by individuals. This basis of thinking is a philosophical foundation in which various models of personnel evaluation can be used as a basis for developing a process that is systems oriented. As a result, components of clinical supervision models have been integrated into total systems approaches in evaluation.

Components of an evaluation system

In general, the research suggests that there are multiple components of an effective evaluation system. Generally, a performance evaluation process includes a formative and summative component. Stronge and Helm (1991) define these as:

Formative--used for the improvement of performance.

Summative--used for personnel or program decision making.

(p. 24)

Van Gorp (1993) further discusses these by saying that formative evaluation activities include: formal and informal observations, pre- and postobservation conferences, coaching, the collection of supporting data and input, and that summative evaluation activities include a summative evaluation and summative conference as part of a professional review. Glatthorn (1986) and McGreal (1987) concluded that both formative and summative components of evaluation can be used simultaneously in the process. It is asserted that the educator is in a better position to assist in achieving the school's goals and that the students' and parents' rights to appropriate educational services are protected in educational institutions where formative and summative components of evaluation are found (McConney, 1995).

Stronge and Helm (1991) assert that in a comprehensive evaluation system, all the employees in the school or educational institution participate in the evaluation process. They suggest that the improvement of performance of all employees directly affects the delivery of better services to students and other clients. One of the ways that employees may be involved in this process is through goal setting. McGreal (1987) and Stronge and Helm (1991) suggest that goal setting is a key component in the whole evaluation process. It is a central theme to the whole process. Goal setting for the individual being evaluated is important; however, the organization's goals must be a component of the evaluation system as well. The organizational mission statement is a source to begin to develop goals (Moody, 1995).

In considering components of an evaluation system, it is recommended by Manatt (1982) that key questions be addressed which include the following: 1) What are your purposes? 2) What are your criteria? 3) How high are your standards? and 4) How will you monitor and report performance? Regardless of the evaluation system any educational organization may choose, Conley (1987) concluded that eight critical attributes of an effective evaluation system should be included as a component of evaluation:

1. All participants must accept the validity of the system.
2. All participants must thoroughly understand the mechanics of the system.
3. Evaluatee must know that the performance criteria has a clear, consistent rationale.
4. Evaluators must be properly trained in the procedural and substantive use of the system.
5. Levels of evaluation must be employed, each with a different goal.
6. The evaluation must distinguish between the formative and summative dimensions.
7. A variety of evaluation methods should be used.
8. Evaluation must be a district or educational institution's priority. (p. 61)

Performance evaluation models in education

The 1970s, 1980s, and early 1990s have brought many different models of performance evaluation of educational personnel. Popham (1988) has grouped these evaluation models into five non-mutually exclusive categories: 1) goal attainment models, 2) decision-facilitation models, 3) judgmental models emphasizing outputs, 4) judgmental models emphasizing inputs, and 5) naturalistic models. One of the earlier more effective models, the clinical supervision model, has been researched and applied to the educational setting by some well-known researchers

(Hunter, 1979, 1980; Manatt, 1976, 1983; Manatt & Stow, 1984). In general, this model provides for a process that calls for a preobservation conference between the employee and supervisor, formal observation, and postobservation to provide comments for improvement. The cycle usually ends with a summative report that is a checklist of performance indicators which describe the level of performance the employee has performed. The employee performance indicators are based on research. This model has dominated the educational evaluation scene as it is strong in creating an atmosphere of some accountability; however, more recent models have added to it. A model of employee evaluation that emphasizes a combination of clinical supervision, employee input, and peer feedback in the business sector was developed in the early 1990s. It is defined as the 360 degree feedback model and has been used by such major corporations as American Express, AT&T, Citibank, Colgate, Levi Strauss, Northern Telecom, and Proctor & Gamble. As part of an employee's evaluation, he or she receives feedback on job performance from a full circle of people in the organization including supervisors, subordinates, peers, and external and internal customers (Smith, 1993). One of the few models for evaluating educational support personnel has been suggested by Stronge and Helm (1991). They proposed the Professional Support Personnel (PSP) evaluation model. This model proposes six steps in the evaluation process: 1) Identify system needs, 2) relate program expectations to job responsibilities, 3) select performance indicators, 4) set standards for job performance, 5) document job performance, and 6) evaluate performance (see Fig. 1). The model

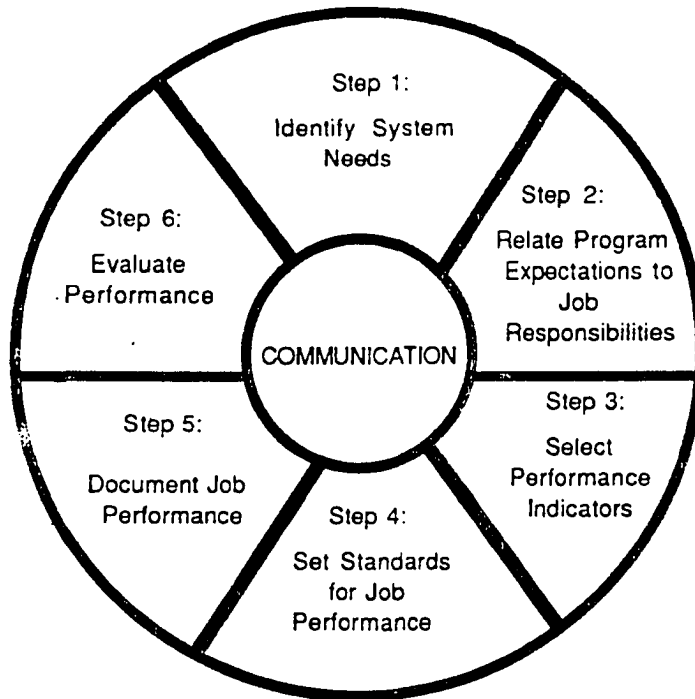


Figure 1. Professional Support Personnel Evaluation Model (Stronge & Helm, 1991, p. 38)

integrates research and theory from other models and researchers and builds upon it. It is influenced by Tyler's research on goal attainment (Tyler, 1942), and Context, Input, Process, Product (CIPP) evaluation model developed by Stufflebeam at Ohio State University in the late 1960s (Stufflebeam, 1983). The model was recently verified as effective by its use in the Williamsburg/James City County School System in Virginia (Moody, 1995).

Regardless of the model chosen, Manatt (1989) suggests that as part of the evaluation process the organization should develop philosophies and the instruments as well as develop procedures and written agreements

to help employees improve. It is also important that tools and data collection techniques be defined. Van Gorp (1993) developed a chart to define the various tools and techniques used in the evaluation process (Table 1).

Educational Secretaries

It is important to understand who and what the educational secretary is, as well as how he or she came into existence. Normally the educational secretary is a female. Less than 1 percent of all secretaries in the United States are of the male gender (Rimer, 1984; Moseley-Hennebach, 1989). He or she is generally seen as someone who not only enjoys the typical daily tasks of a secretary, but someone who loves people and kids. White (1969) emphasizes that secretaries provide love, attention, and recognition to children. Secretaries are seen as people who like working with others, enjoy human interaction, and prefer variety in their daily tasks (Fried, 1988; Simon, 1972).

History of the educational secretary

Research on the history of educational secretaries is limited to the duties, pay, requirements, and evolution of the position. This coincides with the changes in the development of the public educational system. Casanova (1991) suggests that the evolution of the secretary coincides with the evolution of the school principalship. In early years of education there was the one-room school house in which the teacher took care of all administrative and secretarial functions. At the turn of the

Table 1. Evaluation process tools and data collection techniques^a

Tools/techniques	Description
Anecdotal records	Narrative reports of observations.
Artifacts	Materials sampling.
Audiotaping	Recording the verbal interactions occurring in a situation/specific setting.
Checklists	Evaluate person against a uniform set of criteria.
Cognitive coaching	Professional development approach that enables participants to recognize, perform, and coach for the cognitive process of teaching.
Conferencing	Joint review between evaluator and evaluatee of collected data/results.
Discourse analysis	Captures the ways multiple forces interact mutually within the cultural context to shape instruction.
Flanders' interaction analysis	Analyzes verbal interaction between teachers and students.
Individualized portfolio system	A way to identify the quality and quantity of teaching and research that each discipline considers appropriate and valuable; includes a collection of materials demonstrating what the evaluatee has been doing and has accomplished, a plan outlining the evaluatee's goals and objectives, a description of support needed to reach the goals, and a description of the evidence that will demonstrate that those goals have been reached.
Mentoring	Supportive coaching between colleagues.
Modeling	Demonstrating the desired behavior.

^aSource: Van Gorp, 1993, pp. 33-34.

Table 1. Continued

Tools/techniques	Description
Multiple data sets	Utilizing input from a variety of sources.
Narratives	Reports of observations and data collected in written form.
Observer rating tool	Predetermined list of behaviors that the observer will rate on a consistent scale.
Peer coaching	Non-threatening collegiality, colleagues working together to improve performance.
Peer evaluation	Supervisory technique rather than an evaluative technique; feedback from a peer generally used by the evaluatee for his/her own personal growth.
Peer sharing	The sharing of ideas, materials, techniques among colleagues.
Reflective teaching	Carefully structured method of peer teaching; a formative technique.
Room map	A diagram of the room arrangement in which the behavior is occurring; notations of movement around the room are made by the observer.
Selective verbatim analysis	The verbatim recording of selected verbalizations that occur during an observation that can be analyzed to identify specific behaviors as well as patterns of behavior.
Self-assessment	Evaluatee assesses his/her own performance based on the same criteria as used by the evaluator; generally to be used by the evaluatee for his/her own personal growth; supervisory technique rather than an evaluative technique.
Simulated teaching	A staged teaching situation to demonstrate teaching style/behaviors.
Student evaluation	Generally completed by high school students or older, to be used primarily by the evaluatee for his/her own personal growth; supervisory technique rather than an evaluative technique.

Table 1. Continued

Tools/techniques	Description
Student learning objectives checklist	A skills list for any given curricular area that will be used to document the level to which any student has achieved the predetermined objectives.
Supervisor observation	An on-site visitation by the evaluatee's supervisor to observe and record behavior.
Tests of student performance	Assessments or measures of any given student's level of performance in an identified activity/subject area.
Time-on-task analysis	Observation/documentation of the percentage of time any given student displays on-task behavior.
Videotaping	Recording the behavioral interactions occurring in a situation/specific setting.
Visiting team of experts	Group of individuals with background information/skills relative to the given setting who observe and provide feedback.

century, school population grew fast and multiple classrooms in one building began to emerge. Thus, the evolution of the lead or head teacher occurred. The lead teacher was assigned administrative responsibilities related to maintenance, attendance, records, and discipline. They also became instructional supervisors. As the need for administrative responsibilities grew, lead teachers needed relief from some of the duties of teaching. This need was greatest in urban schools (Casanova, 1991).

During the 1930s, the duties of an administrator could be classified as: administrative details related to the janitor, responding to needs of the teachers, attendance and discipline, supplies, inventories, records, and answering correspondence. Therefore, in the 1920s and 1930s, the need for clerks and secretaries developed, especially in the urban schools. In 1928, 38 percent of all elementary principals had clerks, and 45 percent of all principals in urban areas had full-time assistants. One school clerk was assigned per 785 students. Casanova (1991) asserts that as the role of the principal became more dominated by males, lower status duties were assigned to female clerks.

Early on, the principal was more of an instructional leader and the majority of principals were women. As the role became more managerial beginning in the 1930's through the 1970's men started to dominate the principalship. Thus the secretary's role changed. It makes logical sense that now that the role is getting to be more instructional, the secretary's role will change again. (Casanova, 1991)

Secretarial pay during the early years was relatively high. Salaries in 1929 ranged from \$1,400 to \$5,000. Thus, secretaries' salaries have not kept up with inflation or kept their value. In fact, in 1930,

especially in larger urban areas, clerks had better salaries than teachers. Salaries for secretaries have since then been relatively lower. Much of this has to do with the fact that society's attitude toward women's pay has not been favorable to females (Casanova, 1991).

In terms of the education level of secretaries, it has not changed much. Henderson (1929) reported that nearly 50 percent of all secretaries were required to have at least a high school education, some had to pass an exam, and some had some teaching experience. Today's secretary must have at least a high school diploma. Many secretaries have two years formalized training and/or four-year degrees (Casanova, 1991).

Characteristics of the educational secretary

The educational secretary has certain characteristics that distinguish him or her from other types of secretaries in different fields. Some of these characteristics are positive and some are negative. On the positive side, the reason most educational secretaries choose to be secretaries in education versus other fields is often because they like to be around children and they like variety in their job (Casanova, 1991, 1986, 1985; Fried, 1988; Hales & Hyder, 1971; Rimer, 1984). Perhaps this is because educational secretaries have a helping attitude toward children. Casanova (1991) found that secretaries take pride in their ability to help others. They like to contribute to the educational process and they want to demonstrate their competence and efficiency. The research also suggests that educational secretaries

enjoy balancing power. The secretary rarely likes to assume responsibility for leadership while in the presence of the principal. However, he or she will assume responsibility during the principal's absence. According to Casanova (1991), women are especially good at balancing intermittent power due to traditional marital patterns in which the family is patriarchal. She suggests that the same relationship exists between doctors and nurses.

Negative characteristics of the educational secretary have been identified by Fried (1988). She suggests that the person who chooses the secretarial field often has poor academic skills, low self-esteem, and little motivation. She also concluded that the reason most educational secretaries leave the educational secretary field is because of low pay and low prestige.

Duties and responsibilities of the educational secretary

Perhaps the largest percentage of research related to educational secretaries has been in the area of duties and responsibilities. In as early as 1958, the California State Department of Instruction defined the multiple responsibilities of the educational secretary:

Secretaries receive and route telephone calls; meet adults who stop at school for various reasons; register pupils and process these records; act as liaison between principal and staff, pupils and public; attend faculty meetings from time to time; handle clerical work involved in scheduling trips and visits by pupils; keep records of attendance; prepare necessary routine reports; organize the work of the office so that records and reports are forwarded on the due dates; check, store, distribute books and supplies, take inventory and order forms and supplies; take and transcribe dictation; handle confidential correspondence of the principal; sort and distribute the mail; prepare replies to routine correspondence; keep the principal informed about activities needing his attention; establish and

maintain an adequate filing system; type and reproduce materials needed by teachers; receive and deposit school money; keep a record of school finances; conduct school business in the community, as directed by the principal; lay out and direct the work of clerical assistants; mimeograph and type letters, notices and the school newspaper; keep office bulletin boards attractive and up-to-date; administer first-aid in the absence of a nurse or doctor; maintain schedules of assigned responsibilities for personnel and schedules for use of equipment. (California Department of Public Instruction, 1958)

Today the role of the educational secretary is complex and filled with a great variety of duties similar to those in 1958. Researchers have defined what educational secretaries tend to do and these activities seem to fit large categories such as public relations, processing information, fiscal management, decision making, clerical/computer related tasks, office management, and coordinating multiple tasks (Casanova, 1986, 1991; Hales & Hyder, 1971; Hoffman, 1989; NJAES, 1974; Rentschler, 1983). Perhaps Rimer's (1984) study which used an ethnographic methodology in which he observed three elementary secretaries in public schools, helps one understand the different job clusters of the school secretary. He tried to seek patterns in the random currents of everyday behavior. He collected detailed facts of what secretaries do by observing them. The school in his sample was in a district in the Northwest United States, composed of 2,300 students in a diverse university town. As a result of his research, he defined six clusters of work activities for educational secretaries: public relations, student services, clerical work, office management, information supplier for staff, and administrative assistant to the principal. He goes on to define and elaborate on these clusters in detail:

Public relations is important to both the principal and the secretary. School districts are very concerned with local and parental involvement. Secretaries explain such things as policy and rules. Impressions created at initial meetings tend to set the tone and feeling for the school. Secretaries deal with community organizations, special interest groups, and parent-teacher groups on scheduling, activities and special concerns.

Student Services - In this capacity, the school secretary attends to students' nonlearning needs. Rimer suggests that they are the mother away from home. They are often nurse, disciplinarian and repair person. They do paperwork related to student services.

Clerical work - Routine duties include: filing, typing, answering the phone, accounting, bookkeeping, record keeping, maintaining medical records, collecting money, writing checks, making deposits, filling out requisitions, maintaining staff and student records, requesting or sending student information, lunch programs, operating office equipment and maintaining office supplies.

Office management - Maintain office appearance and environment.

Supplier of staff information - Secretary is the main source of information. Teachers expect the secretary to be familiar with all students in their classes and often ask her questions about the families of the students. Rimer suggests that they attend faculty meetings.

Administrative assistant to the principal - Handle principal's calls, paperwork, organization and management of things.

Casanova (1985, 1986, 1991) goes a little further in her research. Using a large sample, she surveyed both secretaries and principals and gained quantitative data, archival data, and qualitative data in her results. As a result of her research, she suggests the following nine categories for secretarial tasks:

1. Tasks related to the principal's work.
2. Tasks related to the maintenance of the records.
3. Tasks related to school finances.
4. Tasks related to student support.

5. Tasks related to the support of instructional staff.
6. Tasks related to securing and distribution of materials.
7. Standard secretarial tasks.
8. Public relations tasks.
9. Odd tasks.

Many other researchers have contributed to defining the duties of the educational secretary. Research conducted by Mann (1985) suggests that the educational secretary performs these responsibilities: telephone, mail, appointments, visitors, filing, office organization, human relations, confidentiality, and objectives. Hart (1985) interviewed 15 secretaries and 20 head teachers in Great Britain to determine the role of the secretary as prescribed, performed, and perceived. He concluded that educational secretaries are thought of as a parent sub, the eyes and ears of the head (principal), the sounding board, the leader of support staff, the gatekeeper, and the financial consultant. Moseley-Hennebach's (1989) research found the following activities were performed by secretaries on a regular basis: word processing, business writing, office data systems, public relations, understanding the company product, communication systems, data analysis, accounting, management principles, graphics, and layout. Table 2 summarizes the major categories of educational secretaries' duties identified by the researchers.

Perhaps of the roles defined above, public relations is one of the most important. Hoffman (1989), Rentschler (1984), and Richards (1991) have all studied the importance of the secretary in public relations. Fry (1991) concluded that administrators and teachers ranked public

Table 2. Categories of duties performed by educational secretaries as identified by some of the major researchers

Duties/tasks	California Dept. of Instruction	Casanova	Fry	Mann	Moseley- Hennebach	Rimer
Assisting supervisor	X ^a	X				X
Clerical- computer	X	X	X	X	X	X
Fiscal management	X	X			X	
Office manager				X	X	X
Public relations- commun.	X	X	X	X	X	X
Records/ maintenance/ filing	X	X	X	X		X
Staff informer/ supporter	X	X				X
Student services	X	X				X

^aX=identified by that researcher as a category of educational secretary duties.

relations as one of the three most important activities of the secretary. Since the secretary interacts with all of the external and internal customers, his or her role in public relations is crucial (Stovall, 1993). Casanova (1986, 1991) stresses that the secretary plays a big role in public relations and processing information. All visitors must first face a secretary, including parents, students, vendors, and others. She observed the secretary's public relations role as follows: greeting visitors, helping new students and their parents get acquainted, and making preliminary arrangements with media of all types. One of the elements to determining the importance of public relations as it relates to the educational secretary may have to do with the research on how much time he or she spends in it. Many authors suggest that the secretary spends a significant portion of her time performing activities related to public relations (Casanova; Finch, 1988; Hales & Hyder, 1971; Hennebach; Mann, 1980; NJAES, 1974; Rimer, 1984; Roe, 1964; Stovall, 1993; Sweeney, 1986; Vinnicombe, 1982).

The research on what a secretary does in terms of his or her duties also reflects what the secretaries believe they need in terms of skills to perform their daily functions. Fry (1991) found that secretaries rated computer operations as the most important skill to have; filing was second, and public relations was third. Dictation and transcribing were rated the lowest. Johnson's (1984) research revealed that secretaries rated typewriting as the most valuable skill they had. The three least used skills were calculator, shorthand, and machine transcription. More than half of the respondents in his research indicated that they needed

to develop more skills in computer/word processing. Casanova (1991) found that secretaries spend a lot of time involved in conflict, thus they need skills in dealing with conflict.

The research on educational secretaries has also revealed that educational secretaries have to deal with some specific working conditions. Casanova (1991, 1986, 1985) found that two conditions have the most effect on the pace and variety of the secretary's workday: the student population served by the school, and the availability of a nurse at the school. The more students per secretary, the more they must tend to multiple tasks. If the building does not have a nurse, the secretary often tends to the medical needs of the children. Vinnicombe (1982) concluded that the largest portion of the secretary's day is spent in dealing with constant interruptions. Casanova (1991) observed that in a given two-hour period, a secretary will interact with 15 to 40 people. This does not include phone calls. She also found that the secretary's workday is busiest before school when teachers arrive until the first bell, during lunch, and after school until the teachers leave. She asserts that the secretary can usually get much done very early in the morning before teachers arrive and after teachers leave.

One might assume that duties of the secretary might differ significantly depending upon the level of students they are working with. However, Crimm (1985) found that duties assigned to educational secretaries did not vary much in terms of level (elementary, secondary, central office, etc.). Almost all educational secretaries spend a

portion of their day in some type of written correspondence activity and on the phone.

Casanova (1991) reports on what secretaries would rather not do: Most secretaries do not enjoy taking care of students in the office when the principal is not available, watching students before school when parents drop off students too early (baby-sitting), and taking care of first aid or nursing (mainly because they do not feel qualified to handle such things).

Little is found with how the secretaries' daily job functions impact instruction. However, Casanova (1991) did conclude that very rarely do the secretaries get assigned roles of instruction. On occasion they will be asked to do such things as take care of bulletin boards, instructional displays, and sometimes help elementary kids with homework.

Trends in the secretarial field

The research suggests that there are a number of current trends that will have an impact on the secretarial profession and many researchers have predicted what the future will bring. Banach (1988), Eisman (1990), Fried (1988), Hart (1985), Hennebach (1989), and Hosler (1988) suggest that the secretarial field is one of the fastest growing fields in the United States. They predict a possible shortage of well-qualified secretaries as demand will outweigh supply. Nearly 300,000 to 500,000 new secretaries will be hired each year until the year 2000. They also report that the nation will become more white-collar in nature through the remainder of the 1990s, thus increasing office automation. All of

them suggest that as the secretarial role changes and new jobs become available, secretarial training will become more of a need. Fried (1988) suggests that the role of technology will constantly change the secretary's work. Word processing changes will make life easier for the secretary and he/she will have more opportunities to get involved in management functions. Moseley-Hennebach (1989) predicts that secretaries will be more involved in public relations from a managerial standpoint, and they will be more involved in communication systems, data analysis, graphics and layout, and accounting. She believes that they will become more like managers. Hart (1985) asserts that in the future, secretaries will become more like facilitators and coordinators. Technology will force the secretary to do the following: act as secret keeper--the secretary will have access to much more information as technology increases; 2) act as consultant--with information they can analyze data, assist in researching using the computer, and facilitate information through computers. The secretary will become more of a coordinator of such things as hiring office personnel, maintaining budgets and expense accounts, and purchasing supplies and equipment. Eisman (1990) believes that secretaries will play the role of trouble shooter more often than they currently do, and Hosler (1988) suggests that in the future secretaries will need to develop their critical-thinking and problem-solving skills.

Value of the educational secretary

Many researchers have commented on the value of the educational secretary to the school or educational institution. This value was recognized early on as Givens (1936) suggested that a large part of the responsibility for a smoothly running school system rests on the school secretary. Glenn (1937), the president of the American Association of School Administrators (AASA), said that school secretaries bear an important part of the responsibility of creating for the administration a favorable impression on the public.

Many have suggested that the effective secretary has a positive impact on the principal. Mann (1980) asserts that one of the most critical resources contributing to a principal's effectiveness is the secretary. Pharis (1981), with a survey conducted by the National Association of Secondary School Principals (NASSP), reported that principals who were deemed effective said that they had efficient secretaries. Successful corporate executives have observed that effective utilization of the secretary is high on the list of the executive's most important tasks (Mann, 1980). Reynolds and Tramel (1971) suggest that the secretary is the most efficient instrument of change a principal has at his/her disposal. Casanova (1991), Cooper (1979), Hennebach (1988), Reynolds and Tramel (1971), and Rimer (1984) all suggest that the job duties the secretary performs are essential to the educational setting. If not performed well, their functions would have a negative impact on day-to-day operations of the school.

Related Research

The review of the literature has demonstrated that there has been significant research found in evaluation theory and methods and that much of that research has related to teachers and administrators. Research on the educational secretary exists; however, it has focused primarily on characteristics and duties of the job and future trends. Bernotavicz (1984) and Ohio State University (1992) studied and suggested competencies of good secretaries. Stansberry (1990) studied secretary job satisfaction as it related to secretary and principal work style.

Although it appears that there is recent research on evaluation of support personnel in education, very little to no research exists on secretarial evaluation. There is no evaluation instrument designed with the criteria to evaluate a secretary even though the research suggests what the criteria might be. Also, no process for evaluating the educational secretary has been suggested even though there are many processes for other employees suggested in the literature.

Research closely related to designing a total educational secretary evaluation instrument and process is limited. Simmons (1986) studied the effects of goal setting and self-appraisal as it related to secretaries/ clerks and supervisors. Perhaps Van Gorp (1993), with her dissertation in which she developed and implemented a performance evaluation system for an intermediate education agency, is the closest. In this study she identified the critical work activities for all workers in an area education agency that included some secretaries in her sample. From this she developed job descriptions and she designed the evaluation

instruments to be used. The process she used was part of the School Improvement Model used by researchers at Iowa State University.

Other researchers at Iowa State University have conducted research related to establishing criteria for evaluation of certain school personnel. Ruebling (1991) selected the criteria for the evaluation of school district-level curriculum administrators. Green (1990) identified valid, reliable, and discriminating criteria for use in developing evaluation instruments for substitute teachers. Holzman (1992) duplicated Green's research with special education teachers.

Qualitative Research

Since this study is in part qualitative in nature, it is important to give a brief explanation of what qualitative research is.

Borg and Gall (1989) suggest that qualitative researchers view themselves as the primary collector of data. They rely partly or entirely on their feelings, impressions, and judgments in collecting data. Qualitative research is subjective and relies upon the investigator to observe, interpret, and provide valid information. They suggest that other names for qualitative research are naturalistic research, ethnographic research, subjective research, and post-positivistic inquiry.

Characteristics of qualitative research

Borg and Gall (1989) suggest that the following ten characteristics of qualitative research are generally accepted by workers in the various disciplines who employ this methodology.

1. Research involves holistic inquiry carried out in a natural setting.
2. Humans are the primary data-gathering instrument.
3. Emphasis on qualitative methods.
4. Purposive rather than random sampling.
5. Inductive data analysis.
6. Development of grounded theory.
7. Design emerges as the research progresses.
8. Subject plays a role in interpreting outcomes.
9. Utilization of intuitive insights.
10. Emphasis on social processes.

Qualitative research methodology

Borg and Gall (1989) suggest that in qualitative research the researcher usually has three methods to choose from. The first method is participant observation. Using this method, the researcher participates in the observation and gains insight through the development of interpersonal relationships. A second method is called the informant interview. In this method the researcher conducts unstructured interviews to gather insight. The researcher is given flexibility and latitude in the types of questions he asks and information he gathers. A

third method is identified as the case study. Using this method, the researcher makes a detailed examination of a single subject or group or phenomenon. Borg and Gall (1989) also suggest that in conducting qualitative research, the researcher should use more than one of the methods to collect data, as doing this develops new perspectives about how the topic of the investigation is developed and increases validity. Using more than one method to collect data is referred to as triangulation.

Advantages and disadvantages of qualitative research

Goetz and LeCompte (1984) identified a number of advantages and disadvantages to qualitative research. They believe the advantages are that it provides a complete picture, gives a longitudinal perspective, will lead to new insights and hypotheses, and that theories and hypotheses are grounded solidly in observational data gathered in a naturalistic setting. They believe that some of the disadvantages are that qualitative research tends to require a great deal of training of the researcher and/or data gatherers, requires many hours of observation to get complete understanding, and tends to be subjective in nature and, therefore, can lead to observer bias.

Summary

In summary, this chapter has reviewed the history and development of educational evaluation and the secretary's role in education. The information has been valuable in setting a framework for this study.

This chapter has also reviewed the nature of qualitative research and thus provides a backdrop for the methodology chapter. The research has revealed some significant trends. First, educational evaluation has evolved from virtually nonexistence into a complex process of goal identification, development of evaluation job criteria, observation of employee work, supervisor and peer feedback, and self-analysis. Second, the research has identified the importance of, and discussed in great detail, the secretary's role in the management of a complex social institution known as a school. What the research fails to establish is a process to evaluate the educational secretary and the instrument to use to do it. See Table 3 for a summary of researchers' contributions to educational evaluation and the educational secretary.

Table 3. Summary of findings--educational secretaries

Researcher/group	Date	Main points/findings
California Dept. of Public Instruction	1958	Secretaries perform various multiple activities which include handling the phone, managing records, and typing.
Casanova	1991, 1986, 1985	One of the first researchers to analyze the time a secretary spent working in certain tasks.
Crimm	1985	Found that secretarial roles do not vary much from elementary, junior high, and high school.
Eisman	1990	Emphasized that the secretary is a troubleshooter and a problem solver.
Fried	1988	The role of technology will constantly change the role of the secretary.
Fry	1991	Administrators rank the most important role of the secretary as public relations.
Givens	1936	Concluded that a smoothly run school is a result of a good secretary.
Glenn	1937	Found that public relations is an important part of a secretary's work.
Hart	1985	Found that the secretary's role is developing into more of a facilitator and coordinator.
Hoffman, Rentschler, & Richards	1991, 1989, 1984	All of them emphasized the role of the secretary in public relations.
Johnson	1984	Found that secretaries rate typing as their most important skill.
Mosey-Hennebach	1989	Found that the secretary's performance is essential to the educational setting.

Table 3. Continued

Researcher/group	Date	Main points/findings
Reynolds & Tramel	1971	Concluded that the secretary is the most important person that a principal can use in the change process.
Rimer	1984	Defined the six job clusters of secretaries as public relations, student services, clerical work, office management, information supplier, and administrative assistant to the supervisor.
Stovall	1993	Public relations is crucial.

Table 4. Summary of findings--evaluation of personnel in education

Researcher/group	Date	Main points/findings
Manatt	1982	Defined the key questions that should be asked when developing evaluation systems.
Manatt, Palmer, & Hidlebaugh	1976	Suggest that evaluations be valid, reliable, and legally discriminating.
Moody	1995	Verified the CIPP model in Williamsburg/James City Schools as valid.
Smith	1993	Developed the 360 degree feedback model for evaluation in the business sector.
Stronge & Helm	1991	Developed the PSP model of evaluation and concluded that an evaluation system has both formative and summative parts.
Stronge, Helm, & Tucker	1993	Concluded that evaluation models of educational support personnel rarely exist and if they do are not appropriate.
Stufflebeam	1987	Reported on the Joint Committee of Program Evaluation Standards as utility, feasibility, propriety, and accuracy.
Tyler	1942	Suggested goal attainment as a means for evaluation.
Van Gorp	1993	The evaluation system should address questions, goals of the organization, purpose and usefulness, legal issues, and should be aligned with the employee's job responsibilities as well as the organization's philosophies.

CHAPTER III. METHODOLOGY

This study uses a combination of action research and case study methodology. It is representative of qualitative research. Borg and Gall (1990) also refer to qualitative research as ethnographic, subjective, and postpositivistic inquiry. They say that the qualitative model has slowly gained acceptance as a research methodology over the last twenty years. The model was developed by anthropologists and sociologists and thus sets a new paradigm of nontraditional research methodology.

Characteristics of qualitative research applicable to this study were:

1. It was a study of four complex social entities, an area educational agency, and three kindergarten through 12th grade school districts.
2. The study was completed during a six-year time span as part of multiple Iowa State University School Improvement Model projects contracted with the agency and school districts during this period.
3. Part of the information was obtained through direct, on-site personal contact with the secretaries of the area educational agency and the three school districts.
4. The research sought to understand the basic attitudes, beliefs, values, and underlying assumptions of the employees of the area educational agency and the three school districts.

5. The researcher was interested in the process that was followed during the projects as well as in the performance evaluation system that was developed.
6. Multiple techniques were used for collecting data during the study that included observations, timelogging of critical work activities (CWAs), time analysis feedback sheets, comparison charts of CWAs within job-alike categories, discussions, and personal interviews.
7. Specific hypotheses were not developed prior to the beginning of the study; however, specific objectives were identified.
8. Judgment of the researcher was made regarding certain processes and products that were developed and implemented.

The specific qualitative research methodology implemented in this study were: 1) holistic inquiry, 2) using humans as data gathering instruments, 3) purposive sampling, 4) inductive data analysis, 5) development of grounded theory, 6) emergent design, 7) interpretation of outcomes, 8) utilization of intuitive insights, 9) emphasis on social processes, and 10) confirmation interviews.

The specific activities that were conducted during this study are depicted as follows in chronological order and identified by qualitative methodology.

Introduction to the Projects

Commitment

Methodology: Confirmation interviews, holistic inquiry.

Each of the four educational institutions in the study made a three-year commitment with Professor Richard Manatt and the School Improvement Model (SIM) team from Iowa State University regarding the development and implementation of a performance evaluation system for their respective educational institution. After receiving information about the procedures, timelines, and financial obligations of this type of project, the Board of Directors of the AEA and the boards of education of the three school districts made commitments to proceed with issuing a contract to Professor Manatt and the SIM team for their professional assistance with the development and implementation of a performance evaluation system. In each case, Professor Manatt met with planning committees of each of the four educational entities in this study to provide them with an overview of the ensuing project. These preliminary workshops set the stage for the following three years for each of them.

Stakeholders' committee

Methodology: Purposive sampling.

The initial step in each of the projects was the organization of a stakeholders' committee that would help to facilitate the process and serve as the communication link between the SIM team and employees. The committees of the three school districts were comprised of representatives from the board, central office administration, building level

administration, teachers from each building, paraprofessionals, custodians, secretaries, parents, community members, and students. At the AEA the committee was comprised of representatives from each of the four divisions--Media Services, Special Education Services, Educational Services, and Administrative Services--and included both certified and support personnel. In each case, the commitment and ownership toward their respective projects were vital to the success. The stakeholders' committees met on a regular basis.

Initial training

Methodology: Participant observation, anecdotal records.

Each of the stakeholders' committees was provided workshops by Professor Manatt on a "Total Systems Approach to Performance Appraisal," effective teaching behaviors, culture, and climate. Each was also presented with the following key questions that would help shape the supervision/evaluation system which would be developed: 1) What are your purposes? 2) What are your criteria? 3) How high are your standards? 4) How will you monitor and report performance? 5) How will you help employees get better at what they do?

Philosophy

Methodology: Holistic inquiry, purposive sampling, intuitive insights, interpretation of outcomes, emphasis on social processes.

The first objective of the stakeholders' committees was to establish statements of belief (Appendix A). The functions of the performance

evaluation system were then established (Appendix B). In addition to this, a philosophy of education (Appendix C), a philosophy of teaching or consulting (Appendix D), and a philosophy of administration (Appendix E) were written by each of the stakeholders' committees. The philosophies were developed by addressing key questions that were presented by Professor Manatt (Appendix F). Each of these philosophies was to be related to the overall mission statement of the school district or AEA (Appendix G). All activities in the development and implementation of the performance evaluation system would be guided by them.

The Performance Evaluation Procedures (Appendix H) and the accompanying Performance Evaluation Timeline (Appendix I) and Performance Evaluation Cycle (Appendix J) were also defined and refined by the stakeholders' committees by responding to key questions presented by either Professor Manatt or Professor Shirley Stow, co-director of Iowa State's School Improvement Model. In each case, generic criteria applicable to all employees of the agency were developed during various meetings and training sessions (Appendix K). In later meetings and training sessions, criteria were developed by secretaries representing their subsequent school district or AEA (Appendix L).

Before viewing the process that each of the groups of secretaries went through to develop critical work activities and timelogging, it is important to validate this approach. Dzyacky (1988) validated the steps of determining critical work activities (CWAs): 1) Provide secretaries with a form, 2) give secretaries a rough sample, 3) provide them with instructions, 4) brainstorm common work activities that they will time-

log, 5) timelog for 20 days, 6) SIM office process and analyze activities by the number of hours, frequency of time, and rank, 7) produce individual reports for each secretary to analyze in a follow-up interview, and 8) during the phase of the interview get additional information about the job and timelogging activity.

Timelogging

Methodology: Data collection, purposive sampling, interpretation of outcomes.

In an effort to determine the critical work activities of every secretarial position in the three school districts and the AEA, each secretary was asked to complete a four-week or 20-workday timelogging activity during various times. After the stakeholders of each district or AEA met to determine district philosophies, the various work groups identified by job title were trained in the timelogging process by a member of the SIM team. In this study, secretary groups were assembled for this training prior to the 20-day timelogging. Each group of secretaries was given a generic set of secretarial critical work activities to start on and each group had to identify the secretarial critical work activities they wanted to timelog for the next 20 days. It should be noted that secretaries at the central office level and secretaries at the building level chose different activities to timelog because the majority of the time they could not agree that the same activities applied to each of their jobs. Also, different items to be timelogged were chosen by the different sample groups (districts and AEA)

since each sample group was unique. These results will be shown in Chapter IV. After this training was completed, the secretaries were trained in and performed the following process:

Step 1 - Timelogging Critical Work Activities for 20 days:

1. On the management status report form SA-1 (Fig. 2), secretaries filled in their name, agency, and position in the upper left-hand corner.
2. Secretaries then indicated the timelogging dates which the stakeholders' committee in each district or AEA had chosen on the appropriate blanks.
3. Secretaries wrote the day and date in the slashed boxes along the row titled Critical Work Activity.
4. Secretaries were then instructed to make informal notes in their respective pocket datebooks or appointment calendars about how each of them spent their time during the 20-day timelogging period.
5. Secretaries listed the critical work activities for their position in the left-hand column. The actual number of minutes devoted to each activity was recorded by each secretary each day. Secretaries recorded two types of time:
 - a. minutes during the normal work day, and
 - b. minutes outside the normal work day (circle time).

It should be noted that secretaries recorded blocks of time that were 15 minutes or longer.

6. At the end of each day, secretaries added across the row all of the minutes each of them timelogged during the normal work day in the first total column. Each secretary also added the total minutes he/she spent working outside the normal work day (circle time) and placed that result in total column number two.

Step 2 - Processing the summary data at the end of the 20 days
(Form SA-2, Fig. 3):

1. Secretaries listed the same critical work activities as on Form SA-1 (Fig. 2) on the left column.
2. Secretaries counted and recorded the total number of normal work days devoted to each activity.
3. Secretaries counted and recorded the number of outside normal work days devoted to each activity.
4. Secretaries recorded the number of normal work day minutes (column 1) devoted to the activity.
5. Secretaries recorded the minutes devoted to each activity outside the normal work day (column 2).

At the end of this process, all SA-1 forms and data summary sheets were forwarded to the chairperson of the stakeholders' committee for the prospective district or AEA. The chairperson forwarded the forms to the Iowa State University School Improvement Model Projects Office. The SIM office computed the results and developed a chart for each secretary (Appendix M). The chart explained the total time each secretary devoted to an activity in terms of rank, hours, percent of time spent in each CWA, total days spent working on a CWA, percentage of days a secretary worked on a CWA, and rank of days a secretary worked on any given CWA.

Name/Position/Agency

SA-2

DATA SUMMARY SHEET

	#1 Total Number of <u>Normal</u> <u>Work Days</u> Devoted to Each Activity	#2 Total Number of "Outside Normal Work Days" Devoted to Each Activity (Circled Time)	#3 Total Minutes Normal Work Day (Column 1)	#4 Total Minutes "Outside Normal Work Day" (Column 2)
CRITICAL WORK ACTIVITIES				
1. Maintains all case records.	7	2	150	50
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				
11.				
12.				
13.				
14.				
15.				
16.				
17.				
18.				
19.				
20.				

Figure 3. Data summary sheet

Critical work activities

Methodology: Interpretation of outcomes, confirmation interviews, participant observation, anecdotal records.

The individual employee timeloggging analyses (Figs. 2 and 3) were returned approximately one month later for each of the sample groups in the study. Each secretary in the study was interviewed with a set of follow-up questions (Fig. 4). The purpose of these meetings and individual interviews was to have each secretary check his or her analysis for accuracy and to reach consensus as a job-alike group on the critical work activities for their secretarial positions. This information was ultimately reviewed against the job description for any given secretarial position to develop the summative evaluation report for that respective position.

Comparison charts

Methodology: Interpretation of outcomes.

Comparison charts of time spent by each employee on the critical work activities for each secretarial position in the four sample groups were developed (Chapter IV). Secretaries' percentages of time they worked in major categories were averaged.

Job-specific responsibilities

Methodology: Participant observation, anecdotal records.

From the feedback on critical work activities and from the data obtained for the comparison charts came the identification of job-

CWA/Time Analysis Feedback_____
Name_____
School Organization_____
Employee's Position_____
Interviewer_____
Date

The CWA logging was done to determine your time emphasis, tasks not described in your job description, differences across the same job title, priorities, and terms you use to describe your tasks. These activities will be incorporated into the evaluation system for your position.

1. Give a thumbnail sketch of your job. (Number of staff members supervised; number of students enrolled; type of population served; etc.)
 2. What tasks have a high priority in your job?
 3. To what extent do you devote time to meeting with the public?
 4. How are you able to assist with the improvement of instruction and/or service to your school?
 5. What critical work activities should be dropped because they are not "typical" of your job?
 6. What other activities would be typical for your position but would be done at another time of the year?
 7. The critical work activities will be reviewed against the job description to develop the instrument for your position. Which five or six activities should be given consideration as criteria for your position? (Interviewer: Note these on the CWA table.)
-

Figure 4. CWA/time analysis feedback

specific responsibilities for each secretarial position in the four sample groups. These job specific responsibilities (Chapter IV) were added to the current job description for each secretarial position in the four groups. The job-specific responsibilities were incorporated into the respective summative evaluation report (Appendix N) for each position in the four groups.

Creation of the instrument

Methodology: Observation, anecdotal records, confirmation interviews, purposive sampling, interpretation of outcomes.

An evaluation instrument is then created as a result of the following: 1) review of the philosophies of each of the four school organizations, 2) review and analysis of the job descriptions supplied by each secretary in the study, 3) CWAs identified and agreed to by the secretaries in the study, and 4) review and analysis of the structured interview sheet.

Draft handbook and evaluation instruments

Methodology: Observation, anecdotal records, confirmation interviews, purposive sampling, interpretation of outcomes.

In this process, a separate handbook is developed. This handbook includes a suggested summative evaluation report and evaluation process that is suggested for the educational secretary based on the commonalities of all secretaries in the four groups. This information is made available to the four school organizations used in the study. It

will also be used by the Iowa State University School Improvement (SIM) team when working with other school districts in the future.

CHAPTER IV. ANALYSIS AND RESEARCH FINDINGS

A performance evaluation system for educational secretaries was developed as a result of these projects conducted with the Iowa State University School Improvement Model (SIM) and as a result of this study's particular focus.

The problem in this study was to develop an evaluation instrument for educational secretaries based on what it is educational secretaries specifically do. An additional purpose was to determine if there was a link between what a secretary performs on a daily basis and time allowed for his/her supervisor to spend more time on instructional related issues.

Status of Objectives

The status of the objectives for this research study follows.

Objective 1: Build a comparison chart of critical work activities (CWAs) for a data base and build norms.

Each of the secretarial groups from the four educational institutions identified the work activities they wanted to timelog during the 20-day timelogging activity as explained in Chapter III (Table 5). This comparison chart is the beginning of defining what activities eventually will be determined as critical for the secretary to perform his or her job. It is the original data base from which norms can be established.

Table 5. Critical work activities chosen to be timelagged by secretaries of each school district and AEA

Basehor-Linwood:

Arranges for substitutes
 Assists/communication with employees/students/public
 Assists with medical needs
 Copies print material and documents
 Coordinates facility usage
 Distributes mail
 Facilitates needs of supervisors
 Facilitates phone calls
 Generates reports accurately
 Maintains accurate records
 Maintains files and filing
 Organizes or systemizes correspondence and documents
 Prepares materials, booklets, etc.
 Receives and deposits monies
 Records attendance and logs dismissals
 Runs errands for the district
 Types and announces daily announcements
 Types, word processes, and enters data

Fremont County District #2:

Attendance, lunch count, bus slips
 Attendance/absence calls
 Clerical/teacher time
 Closing daily attendance
 Computer/typewriter
 Enrolls new students
 Ineligible correspondence with parents
 Kids/administration/telephones
 Lunchroom duty/delinquent notices
 Mail
 Morning ritual: coffee, machines, etc.
 Nurse
 NWSAA and general correspondence
 Phone messages
 Purchase orders
 Records, copies, and mail grades
 Recordkeeping
 Repairs
 Runs copy machine
 Schedules
 Special education forms and letters
 Sports programs
 Strategic planning
 Teaches software programs to teachers
 Time cards

Table 5. Continued

Transcripts

Weekly progress reports

Lincoln County School District #1:

Assists students

Assists supervisor

Assists teachers

Banking/bookkeeping

Executes clerical skills

Executes communication/receptionist skills

Facilitates and caters meetings/office

Generates reports and maintains records

Performs lunch duties

Receives and distributes mail

Supervises students in the office

Takes/forwards phone messages

Types/files

Western Hills AEA #12:

Files

Maintains accurate records

Maintains data base system

Maintains filing system

Maintains office

Maintains records

Operates the telephone

Participates in professional growth

Performs clerical duties

Performs data processing

Performs library cataloging

Performs word processing

Photocopies

Prepares and processes purchase orders

Processes mail

Schedules work day activities

Types/photocopies

Works on inventory

Objective 2: Identify critical work activities (CWAs) for each secretarial position in public schools or educational support agencies.

It became clear that some work activities identified by the four secretarial groups were similar; however, secretaries at the building level, central office level, and AEA had different responsibilities that are unique. Consequently, they recorded many activities that were somewhat different. As a result, CWA data were divided into three major categories: building level, central office, and AEA. Table 6 lists all the CWAs identified by building level, central office, and AEA secretaries. This table shows the number of different CWAs the secretaries at each level identified log time during a 20-day period.

Objective 3: Find the most important 15 to 20 critical work activities the secretary does in his/her work.

Percentages of time were divided into major categories as derived from information in Chapter II (Casanova, 1991, 1986, 1985; Rimer, 1984; Chapter II, Table 2). This was also a result of seeing an established pattern. Table 7 shows a comparison chart of CWAs of the educational secretaries. This table averages the percentage of time all 46 secretaries in the sample groups timelogs in seven major work categories, as well as breaks down the percentage of time building level, central office level, and AEA level secretaries timelogs in the seven major work categories. In using all 46 secretaries as a sample group, they spent the majority of their time (38%) in clerical and computer related activities. All secretaries spent approximately 12 percent of their time in activities related to public relations and 14 percent of

Table 6. Critical work activities of building, central office, and AEA level secretaries

Categories	Number of respondents
<u>Building level secretaries</u>	
<u>Public relations</u>	
1. Take/forward phone messages/administer telephone	10
2. Execute communication skills	2
3. Assist/communicate with employees/students/public	8
<u>Student services</u>	
1. Assist with medical needs	9
2. Assist students	3
3. Supervise students/aides in the office	3
4. Student schedules	2
5. Student absences	1
6. Progress reports	1
7. Enroll new students	1
8. College visits	1
<u>Fiscal management</u>	
1. Receive and deposit monies/count monies	8
2. Purchase orders	2
3. Perform banking/bookkeeping duties	1
<u>Clerical work/computer operations</u>	
1. Word process/type/file	11
2. Maintain files	8
3. Copy/print materials and documents	8
4. Generate reports	8
5. Prepare materials/booklets, etc.	8
6. Organize or systemize correspondence and documents	8
7. Type announcements	8
8. Execute clerical skills	3
<u>Management of records</u>	
1. Generate and maintain records	13
2. Maintain attendance records	10
3. Record copy and mail grades/report cards	7
4. Generate computer records and forms for records	1
5. Delinquent notices	1
6. Transcripts	1

Table 6. Continued

Categories	Number of respondents
<u>Administrative assistant to supervisor</u>	
1. Facilitate the needs of the supervisor	8
2. Assist the principal	4
<u>Miscellaneous</u>	
1. Receive and distribute mail	10
2. Perform lunch duties	9
3. Arrange for substitutes	8
4. Run errands	8
5. Coordinate facilities	7
6. Attend secretary staff development/training	6
7. Assist teachers/train teachers on computers	4
8. Schedule deliveries	1
9. Ineligible correspondence	1
10. Repairs	1
11. Maintain time cards	1
Central office level secretaries	
<u>Public relations</u>	
1. Take/forward phone messages/administration of telephone	3
2. Execute communication skills	2
3. Assist/communicate with employees/students/public	2
<u>Student services</u>	
1. Student related correspondence	1
<u>Fiscal management</u>	
1. Maintain/process payroll/distribute payroll	4
2. Receipt and deposit of monies/count monies	3
3. Research invoices	1
4. Process purchase orders	1
5. Process cooperative orders	1
6. Maintain petty cash	1
7. Write bid specifications	1
8. Maintain budget	1
<u>Clerical work/computer operations</u>	
1. Word processing/typing/filing	2
2. Maintain files	4
3. Copy/print materials and documents	3

Table 6. Continued

Categories	Number of respondents
4. Generate reports	4
5. Prepare materials/booklets, etc.	1
6. Organize or systemize correspondence and documents	3
7. Type announcements	1
8. Execute clerical skills	3
9. Prepare minutes for meetings	2
<u>Management of records</u>	
1. Generate and maintain records	1
2. Record individual development plans	1
3. Record accident reports	1
4. Maintain sick leave records	2
<u>Administrative assistant to supervisor</u>	
1. Facilitate the needs of supervisor	4
2. Assist maintenance director	1
<u>Miscellaneous</u>	
1. Receive and distribute mail	5
2. Run errands	2
3. Coordinate facilities/meetings	3
4. Attend secretary staff development training	2
5. Participate on joint powers board	1
6. Attend board meetings	1
7. Check in freight	1
8. Update software	1
Area education agency secretaries	
<u>Public relations</u>	
1. Operate telephone/answering machine	17
2. Serve as receptionist	3
3. Respond to needs of public	3
4. Perform public relations	1
5. Consult with parents	1
6. Make contact with the public	1
7. Exchange information with other agencies	1
<u>Fiscal management</u>	
1. Prepare and process purchase orders	2
2. Process completed jobs	1
3. Process incoming jobs	1

Table 6. Continued

Categories	Number of respondents
4. Monitor weekly accounts and deposits	1
5. Prepare billing statements	1
6. Prepare invoices	1
7. Prepare budget report review	1
8. Prepare travel expense vouchers	1
<u>Clerical work/computer operations</u>	
1. Perform clerical duties	17
2. Perform word processing/typing	16
3. Prepare reports/projects	10
4. Photocopy	8
5. Perform data processing	3
6. File/maintain files	3
7. Perform/carry out secretarial duties	2
8. Design and implement department newsletter/publications	2
9. Design/implement computer forms	1
10. Perform computer information retrieval	1
11. Process inventory items	1
12. Process incoming/outgoing requests	1
13. Create catalogs/bibliographies	1
<u>Management of records</u>	
1. Maintain records/general	15
2. Maintain data base system	10
3. Maintain filing/record system	4
4. Perform library cataloging	2
5. Maintain personnel record system	2
6. Maintain student record system	2
7. Maintain records of materials	2
8. Maintain daily log	1
9. Maintain planning calendar	1
<u>Miscellaneous</u>	
1. Schedule workday activities	8
2. Maintain office procedures	6
3. Work on special projects	6
4. Receive and distribute mail	6
5. Attend secretary staff development/training	5
6. Perform custodial duties	2
7. Troubleshoot	1
8. Direct traffic	1
9. Solve computer problems	1
10. Perform research	1

Table 6. Continued

Categories	Number of respondents
11. Locate consultants	1
12. Perform board secretarial duties	1
13. Coordinate facilities	1

Table 7. Percentage of time sample groups timelogs in seven major work categories

Empl. number	Public relations	Student services	Fiscal mgt.	Clerical/computer	Maint. records	Asst. supervisor	All other
<u>All secretaries</u>							
1	12.88	17.83	8.53	35.77	0.00	6.82	9.41
2	17.96	20.50	0.00	18.43	10.28	19.26	3.84
3	20.39	26.25	0.00	15.30	10.32	14.45	11.06
4	10.53	12.32	0.00	19.10	36.46	12.27	4.63
5	34.01	20.94	2.14	4.45	36.87	0.00	8.55
6	6.73	3.32	7.58	63.25	22.01	0.00	5.77
7	24.08	6.43	7.72	40.25	15.81	11.58	0.74
8	27.83	4.74	6.97	28.16	24.80	7.50	0.00
9	15.01	12.89	1.15	36.47	2.81	2.52	19.58
10	16.91	0.70	1.05	39.06	22.56	9.07	10.63
11	15.47	0.00	8.77	30.49	30.60	2.58	12.09
12	15.87	41.28	2.51	19.81	13.27	0.22	7.04
13	42.53	3.05	0.00	17.99	16.21	5.53	14.68
14	14.24	3.34	15.56	24.36	5.54	18.22	18.73
15	12.53	0.00	4.89	51.13	0.00	4.89	26.55
16	9.94	0.00	0.00	56.21	6.35	20.31	0.85
17	26.09	0.00	0.00	62.36	0.00	9.44	2.11
18	23.74	0.00	0.00	74.19	0.00	0.00	2.07
19	14.68	0.00	15.48	42.73	0.00	22.02	4.59
20	0.00	0.00	48.70	35.44	0.00	0.00	15.85
21	6.59	0.00	57.01	22.28	0.00	1.57	12.55
22	0.00	0.00	61.97	8.49	5.03	2.67	21.84
23	0.00	0.00	77.88	0.00	10.53	0.00	0.00
24	34.69	0.00	0.00	21.30	2.97	0.00	29.69
25	0.00	0.00	0.00	14.79	28.02	0.00	51.56
26	5.01	0.00	0.00	37.54	36.60	0.00	8.96
27	6.44	0.00	0.89	48.19	4.36	0.00	15.48
28	7.14	0.00	0.00	56.36	12.68	0.00	7.55
29	10.80	0.00	0.00	44.13	22.26	0.00	3.45
30	6.48	0.00	0.00	38.84	9.53	0.00	45.17
31	0.81	0.00	0.00	84.94	10.22	0.00	3.50
32	12.68	0.00	0.00	58.93	10.19	0.00	4.42
33	14.80	0.00	0.00	56.42	0.00	0.00	25.24
34	14.35	0.00	0.00	38.33	21.54	0.00	16.53
35	11.61	0.00	0.00	31.25	33.71	0.00	15.40
36	0.00	0.00	0.00	46.92	36.82	0.00	0.00
37	7.54	0.00	72.10	9.18	2.07	0.00	0.00
38	4.79	0.00	0.00	65.89	9.53	0.00	1.87
39	0.00	0.00	0.00	9.34	63.05	0.00	11.22
40	3.50	0.00	0.00	51.59	0.00	0.00	31.56

Table 7. Continued

Empl. number	Public relations	Student services	Fiscal mgt.	Clerical/ computer	Maint. records	Asst. supervisor	All other
41	5.88	0.00	0.00	51.67	11.32	0.00	5.34
42	4.93	0.00	0.00	59.28	16.33	0.00	3.62
43	5.80	0.00	0.00	55.06	7.87	0.00	11.05
44	19.46	0.00	13.32	27.40	20.12	0.00	18.70
45	0.00	0.00	0.00	47.16	35.77	0.00	8.91
46	12.56	0.00	0.00	52.08	12.01	0.00	13.60
Ave.	12.11	3.77	9.00	38.09	14.70	3.72	11.87
<u>Building level secretaries</u>							
1	12.88	17.83	8.53	35.77	0.00	6.82	9.41
2	17.96	20.50	0.00	18.43	10.28	19.26	3.84
3	20.39	26.25	0.00	15.30	10.32	14.45	11.06
4	10.53	12.32	0.00	19.10	36.46	12.27	4.63
5	34.01	20.94	2.14	4.45	36.87	0.00	8.55
6	6.73	3.32	7.58	63.25	22.01	0.00	5.77
7	24.08	6.43	7.72	40.25	15.81	11.58	0.74
8	27.83	4.74	6.97	28.16	24.80	7.50	0.00
9	15.01	12.89	1.15	36.47	2.81	2.52	19.58
10	16.91	0.70	1.05	39.06	22.56	9.07	10.63
11	15.47	0.00	8.77	30.49	30.60	2.58	12.09
12	15.87	41.28	2.51	19.81	13.27	0.22	7.04
13	42.53	3.05	0.00	17.99	16.21	5.53	14.68
14	14.24	3.34	15.56	24.36	5.54	18.22	18.73
Ave.	19.60	12.40	4.43	28.06	17.68	7.86	9.05
<u>Central office secretaries</u>							
1	12.53	0.00	4.89	51.13	0.00	4.89	26.55
2	9.94	0.00	0.00	56.21	6.35	20.31	0.85
3	26.09	0.00	0.00	62.36	0.00	9.44	2.11
4	23.74	0.00	0.00	74.19	0.00	0.00	2.07
5	14.68	0.00	15.48	42.73	0.00	22.02	4.59
6	0.00	0.00	48.70	35.44	0.00	0.00	15.85
7	6.59	0.00	57.01	22.28	0.00	1.57	12.55
8	0.00	0.00	61.97	8.49	5.03	2.67	21.84
9	0.00	0.00	77.88	0.00	10.53	0.00	0.00
Ave.	10.40	0.00	29.55	39.20	2.43	6.77	9.60

Table 7. Continued

Empl. number	Public relations	Student services	Fiscal mgt.	Clerical/ computer	Maint. records	Asst. supervisor	All other
<u>Area education agency secretaries</u>							
1	34.69	0.00	0.00	21.30	2.97	0.00	29.69
2	0.00	0.00	0.00	14.79	28.02	0.00	51.56
3	5.01	0.00	0.00	37.54	36.60	0.00	8.96
4	6.44	0.00	0.89	48.19	4.36	0.00	15.48
5	7.14	0.00	0.00	56.36	12.68	0.00	7.55
6	10.80	0.00	0.00	44.13	22.26	0.00	3.45
7	6.48	0.00	0.00	38.84	9.53	0.00	45.17
8	0.81	0.00	0.00	84.94	10.22	0.00	3.50
9	12.68	0.00	0.00	58.93	10.19	0.00	4.42
10	14.80	0.00	0.00	56.42	0.00	0.00	25.24
11	14.35	0.00	0.00	38.33	21.54	0.00	16.53
12	11.61	0.00	0.00	31.25	33.71	0.00	15.40
13	0.00	0.00	0.00	46.92	36.82	0.00	0.00
14	7.54	0.00	72.10	9.18	2.07	0.00	0.00
15	4.79	0.00	0.00	65.89	9.53	0.00	1.87
16	0.00	0.00	0.00	9.34	63.05	0.00	11.22
17	3.50	0.00	0.00	51.59	0.00	0.00	31.56
18	5.88	0.00	0.00	51.67	11.32	0.00	5.34
19	4.93	0.00	0.00	59.28	16.33	0.00	3.62
20	5.80	0.00	0.00	55.06	7.87	0.00	11.05
21	19.46	0.00	13.32	27.40	20.12	0.00	18.70
22	0.00	0.00	0.00	47.16	35.77	0.00	8.91
23	12.56	0.00	0.00	52.08	12.01	0.00	13.60
Ave.	8.23	0.00	3.75	43.76	17.69	0.00	14.47

their time in maintaining records. The ranking of the number of days each group of secretaries timelogs at least one CWA in each of the major categories produced the top three areas they work in during a 20-day period. This information is summarized in Table 8.

Table 8. Percentage of time secretaries spent working in the major categories (top three choices)

Building level	Central office level	AEA level
1. Clerical/computer	Clerical/computer	Clerical/computer
2. Public relations	Fiscal management	Maintenance of records
3. Maintenance of records	Public relations	Public relations

The percentage of days that each secretary performed at least one specific CWA in one of the major work categories was also calculated and summarized as a whole group, by building level, central office level, and AEA. These results are listed in Table 9. As a result, it is evident that secretaries as a group perform at least one public relations and clerical/computer related activity four out of every five days. Building level secretaries perform at least one public relations activity 19 out of every 20 days, perform at least one activity related to maintaining records 18 out of every 20 days, and perform at least one activity related to clerical/computer work 17 out of every 20 days. Central office secretaries spend the greatest number of days performing at least one activity in the public relations, fiscal management, and clerical/

Table 9. Percentage of days that each secretary in the different sample groups performed at least one specific CWA in one of the major work categories

Empl. number	Public relations	Student services	Fiscal mgt.	Clerical/ computer	Maint. records	Asst. supervisor	All other
<u>All secretaries</u>							
1	100.00	100.00	100.00	100.00	100.00	100.00	100.00
2	100.00	100.00	100.00	100.00	100.00	100.00	100.00
3	100.00	100.00	100.00	100.00	100.00	100.00	100.00
4	100.00	100.00	100.00	100.00	100.00	100.00	100.00
5	100.00	100.00	30.00	30.00	95.00	100.00	100.00
6	100.00	0.00	37.50	93.75	100.00	0.00	100.00
7	100.00	45.00	90.00	100.00	95.00	80.00	15.00
8	100.00	100.00	83.33	100.00	100.00	100.00	0.00
9	95.00	85.00	30.00	85.00	85.00	60.00	85.00
10	100.00	10.00	10.00	95.00	95.00	85.00	85.00
11	90.00	0.00	85.00	90.00	90.00	55.00	65.00
12	70.00	85.00	10.00	50.00	20.00	5.00	65.00
13	100.00	23.53	0.00	70.59	100.00	82.35	100.00
14	84.21	78.95	89.47	78.95	89.47	84.21	94.74
15	100.00	0.00	100.00	89.47	0.00	100.00	100.00
16	70.59	0.00	0.00	70.59	29.41	100.00	5.88
17	100.00	0.00	0.00	100.00	0.00	88.89	27.78
18	94.74	0.00	0.00	94.74	0.00	0.00	36.84
19	93.75	0.00	100.00	93.75	0.00	93.75	43.75
20	0.00	0.00	94.12	94.12	0.00	0.00	94.12
21	100.00	0.00	68.42	42.11	0.00	36.84	89.47
22	0.00	0.00	100.00	42.11	21.05	57.89	94.74
23	0.00	0.00	88.24	0.00	35.29	0.00	0.00
24	100.00	0.00	0.00	100.00	10.00	0.00	100.00
25	0.00	0.00	0.00	100.00	100.00	0.00	100.00
26	57.89	0.00	0.00	73.68	94.74	0.00	68.42
27	93.33	0.00	40.00	100.00	33.33	0.00	100.00
28	100.00	0.00	0.00	100.00	100.00	0.00	94.44
29	100.00	0.00	0.00	100.00	100.00	0.00	81.25
30	100.00	0.00	0.00	100.00	57.14	0.00	92.86
31	18.75	0.00	0.00	93.75	18.75	0.00	56.25
32	100.00	0.00	0.00	100.00	94.44	0.00	83.33
33	100.00	0.00	0.00	100.00	0.00	0.00	100.00
34	72.22	0.00	0.00	55.56	38.89	0.00	94.44
35	100.00	0.00	0.00	100.00	85.71	0.00	92.86
36	0.00	0.00	0.00	100.00	94.44	0.00	0.00
37	94.12	0.00	100.00	35.29	76.47	0.00	0.00
38	100.00	0.00	0.00	95.00	40.00	0.00	10.00
39	0.00	0.00	0.00	70.00	100.00	0.00	60.00

Table 9. Continued

Empl. number	Public relations	Student services	Fiscal mgt.	Clerical/ computer	Maint. records	Asst. supervisor	All other
40	94.74	0.00	0.00	100.00	0.00	0.00	57.89
41	100.00	0.00	0.00	100.00	100.00	0.00	100.00
42	100.00	0.00	0.00	100.00	94.44	0.00	94.44
43	100.00	0.00	0.00	100.00	80.00	0.00	45.00
44	94.74	0.00	57.89	36.84	100.00	0.00	63.16
45	0.00	0.00	0.00	88.89	44.44	0.00	16.67
46	89.47	0.00	0.00	100.00	84.21	0.00	68.42
Ave.	78.56	20.16	35.09	84.11	63.09	33.24	69.17

Building level secretaries

1	100.00	100.00	100.00	100.00	100.00	100.00	100.00
2	100.00	100.00	100.00	100.00	100.00	100.00	100.00
3	100.00	100.00	100.00	100.00	100.00	100.00	100.00
4	100.00	100.00	100.00	100.00	100.00	100.00	100.00
5	100.00	100.00	30.00	30.00	95.00	100.00	100.00
6	100.00	0.00	37.50	93.75	100.00	0.00	100.00
7	100.00	45.00	90.00	100.00	95.00	80.00	15.00
8	100.00	100.00	83.33	100.00	100.00	100.00	0.00
9	95.00	85.00	30.00	85.00	85.00	60.00	85.00
10	100.00	10.00	10.00	95.00	95.00	85.00	85.00
11	90.00	0.00	85.00	90.00	90.00	55.00	65.00
12	70.00	85.00	10.00	50.00	20.00	5.00	65.00
13	100.00	23.53	0.00	70.59	100.00	82.35	100.00
14	84.21	78.95	89.47	78.95	89.47	84.21	94.74
Ave.	95.66	66.25	61.81	85.24	90.68	75.11	79.27

Central office level secretaries

1	100.00	0.00	100.00	89.47	0.00	100.00	100.00
2	70.59	0.00	0.00	70.59	29.41	100.00	5.88
3	100.00	0.00	0.00	100.00	0.00	88.89	27.78
4	94.74	0.00	0.00	94.74	0.00	0.00	36.84
5	93.75	0.00	100.00	93.75	0.00	93.75	43.75
6	0.00	0.00	94.12	94.12	0.00	0.00	94.12
7	100.00	0.00	68.42	42.11	0.00	36.84	89.47
8	0.00	0.00	100.00	42.11	21.05	57.89	94.74
9	0.00	0.00	88.24	0.00	35.29	0.00	0.00
Ave.	62.12	0.00	61.20	69.65	9.53	53.04	54.73

Table 9. Continued

Empl. number	Public relations	Student services	Fiscal mgt.	Clerical/ computer	Maint. records	Asst. supervisor	All other
<u>Area education agency level secretaries</u>							
1	100.00	0.00	0.00	100.00	10.00	0.00	100.00
2	0.00	0.00	0.00	100.00	100.00	0.00	100.00
3	57.89	0.00	0.00	73.68	94.74	0.00	68.42
4	93.33	0.00	40.00	100.00	33.33	0.00	100.00
5	100.00	0.00	0.00	100.00	100.00	0.00	94.44
6	100.00	0.00	0.00	100.00	100.00	0.00	81.25
7	100.00	0.00	0.00	100.00	57.14	0.00	92.86
8	18.75	0.00	0.00	93.75	18.75	0.00	56.25
9	100.00	0.00	0.00	100.00	94.44	0.00	83.33
10	100.00	0.00	0.00	100.00	0.00	0.00	100.00
11	72.22	0.00	0.00	55.56	38.89	0.00	94.44
12	100.00	0.00	0.00	100.00	85.71	0.00	92.86
13	0.00	0.00	0.00	100.00	94.44	0.00	0.00
14	94.12	0.00	100.00	35.29	76.47	0.00	0.00
15	100.00	0.00	0.00	95.00	40.00	0.00	10.00
16	0.00	0.00	0.00	70.00	100.00	0.00	60.00
17	94.74	0.00	0.00	100.00	0.00	0.00	57.89
18	100.00	0.00	0.00	100.00	100.00	0.00	100.00
19	100.00	0.00	0.00	100.00	94.44	0.00	94.44
20	100.00	0.00	0.00	100.00	80.00	0.00	45.00
21	94.74	0.00	57.89	36.84	100.00	0.00	63.16
22	0.00	0.00	0.00	88.89	44.44	0.00	16.67
23	89.47	0.00	0.00	100.00	84.21	0.00	68.42
Ave.	74.58	0.00	8.60	89.09	67.26	0.00	68.67

computer areas. AEA secretaries spend the greatest number of days performing at least one activity in the clerical/computer and public relations areas. It is also evident that AEA secretaries spend no time at all in student service related activities or directly assisting their supervisors. Thus, these are the two areas in which the AEA secretaries differ from the building level and central office level secretaries. The rank of percentage of days that a secretary performs at least one CWA in the major categories by building level, central office, and AEA are summarized in Table 10.

Table 10. Percent of days secretaries performed at least one CWA in the major category (ranked by top three)

Building level	Central office level	AEA level
1. Public relations	Clerical/computer	Clerical/computer
2. Maintenance of records	Public relations	Public relations
3. Clerical/computer	Fiscal management	All other

The identified CWAs were later incorporated into the job-specific responsibilities. As a result, a prototype summative evaluation report was developed that can be used for all central office and building level secretarial positions in the school districts and secretaries in the educational support agency.

Objective 4: Identify job titles for all secretarial positions in public schools or educational support agencies.

Each school district and educational agency had specific job titles for each secretary in their district or agency. The common title of each position is suggested and arranged by three categories: building level secretarial job titles, central office secretarial job titles, and area education agency job titles. Table 11 lists all the job titles reported by all 46 secretaries in the sample groups. The titles are listed by building, central office, and area education agency levels.

Table 11. Job titles reported by all secretaries in the sample groups

Building level:

1. Secretary
2. Secretary/registrar
3. Secretary/attendance clerk
4. Elementary secretary
5. Middle school secretary
6. High school secretary

Central office level:

1. Secretary
2. Secretary/receptionist
3. Secretary/printer
4. Clerk
5. Payroll clerk
6. Accounts payable clerk
7. Secretary/purchasing agent
8. Secretary to the superintendent

Area education agency level:

1. Secretary
 2. Special education secretary
 3. Service center secretary
 4. Secretary of psychology and social work
 5. Secretary of records
 6. Executive/board secretary
-

Objective 5: Design and establish criteria for procedures.

The criteria for evaluation procedures chosen by each of the four groups in this study are summarized in Table 12. This table compares the criteria for procedures chosen by each school district and AEA in the study. As a result, based on similarities and commonalities, the criteria for procedures to evaluate educational secretaries were developed as a prototype. The prototype, found in Appendix O, suggests that the evaluation process consist of both formative and summative components. This prototype may serve as a framework for districts implementing an evaluation process for educational secretaries.

Objective 6: Design a prototype summative evaluation report consistent with the job description for each secretarial position in public schools or educational support agencies.

There are evident commonalities in all secretarial positions that appear in all secretarial job descriptions and thus certain parts of the secretarial evaluation report are very similar across all secretarial positions. However, each secretarial job title does include different job responsibilities that vary from responsibilities defined by other secretarial job titles. See Appendix P for a sample secretarial summative evaluation report. These samples are extracted from two of the four school organizations in this study and serve as a basis for developing a prototype summative evaluation form. See Appendix N for a prototype summative evaluation report designed specifically for the educational secretary based on critical work activities identified by

secretaries and the amounts of time secretaries spend performing the critical work activities.

Objective 7: Design an evaluation cycle.

The cycle for evaluation suggested in Appendix Q is based on research and theory included in Chapter II. It shows a visual perspective of how the evaluation of secretaries fits in with the entire school district's evaluation process. Cycles similar to this have been adopted by the stakeholders' committees of each of the school districts and AEA in this study. The evaluation cycle for all secretaries should be similar in order to establish consistency, equity, and fairness in the evaluation process.

Objective 8: Design a model for the complete process of evaluating the educational secretary.

Although there are differences in job descriptions, job titles, and responsibilities between educational secretaries, the process for evaluating the educational secretary should be the same for each secretary in order to establish some ground of consistency, equity, and fairness. Most models suggesting a complete process are heavily grounded in research and theory developed in administrative and teacher evaluation, which was discussed in Chapter II. As a result of working on objectives 5, 6, and 7, a prototype model for the complete process of evaluating the educational secretary has been developed (see Appendices N, O, and Q).

Objective 9: Compare the amount of time the secretary spends on certain activities and how that time relates to the amount of time his/her superintendent or principal spends on instructional related activities.

The principal in this sample, on average, spends approximately 6 to 31 percent of his/her time on instructional related activities and/or supervision and evaluation of teachers. The average is 18.61%. This average appears to be proportionate to the average time spent by the principal's secretaries in this sample group in public relations, clerical/computer, and maintenance of records. Table 12 summarizes the average amount of time spent by the principal's secretary in public relations, clerical/computer, and maintenance of records (the top three work categories of building level secretaries), with the average amount of time the principal spends in activities related to instructional leadership.

The superintendent in this sample, on average, spends 10.36% of his time in instructional related activities. These activities were identified by the amount of time he devoted to leadership and selecting and evaluating principals. The amount of time the superintendent's secretary spends on public relations, clerical/computer, and maintenance of records (the top three work categories of central office level secretaries) appears to have no relationship to the superintendent's time spent on activities. Table 13 summarizes the average amount of time spent by the superintendent's secretary in public relations, clerical/computer, and maintenance of records with the average amount of time the superintendent spends in activities related to instructional leadership or leadership in general.

Table 12. Average amount of time spent by the principal's secretary in his/her three major work categories (columns 1, 2, and 3) compared to the average amount of time spent by the principals in activities related to instructional leadership (column 4)

Empl. number	1 Public relations	2 Clerical/ computer	3 Maint. records	4 Instruction activities
1	12.88	35.77	0.00	11.90
2	17.96	18.43	10.28	31.15
3	20.39	15.30	10.32	20.19
4	10.53	19.10	36.46	15.67
7	24.08	40.25	15.81	24.65
8	27.83	28.16	24.80	21.56
11	15.47	30.49	30.60	19.20
12	15.87	19.81	13.27	6.04
14	14.24	24.36	5.54	17.13
Ave.	17.69	25.74	16.34	18.61

Table 13. Average amount of time spent by the superintendent's secretary in his/her three major work categories (columns 1, 2, and 3) compared to the average amount of time spent by the superintendents in activities related to instructional leadership or leadership in general (column 4)

Empl. number	1 Public relations	2 Clerical/ computer	3 Maint. records	4 Instruction activities
16	9.94	56.21	6.35	16.88
18	23.74	74.19	0.00	3.84
Ave.	16.84	65.20	3.18	10.36

Table 14 represents the CWAs identified by the superintendents and building principals in the Basehor-Linwood School District and in the Lincoln County School District. When comparing this table with Table 6, it is clear that not a single CWA identified by an administrator matches or cross references with a single CWA identified by a building level or central office secretary. Therefore, comparisons between how secretaries spend their time with how administrators spend their time is inconclusive.

Table 14. Critical work activities of superintendents and principals

Superintendents:

Address legislative issues
 Administer financial program
 Consult with administrative staff
 Demonstrate responsible conduct
 Develop and pass bond issue
 Develop staff personnel
 Engage in professional growth
 Evaluate student progress
 Improve the educational process
 Manage operations
 Maintain physical facilities
 Professional and personal development
 Promote desirable conduct
 Promote district programs
 Promote participatory management
 Provide leadership
 Select/supervise/evaluate staff
 Supervise student activities
 Work with the board
 Work with the community

Principals:

Administer financial program
 Chair meetings
 Demonstrate responsible conduct
 Develop and administer budget
 Engage in professional growth
 Evaluate student progress
 Evaluate programs
 Implement goals
 Maintain communication
 Maintain physical facilities
 Maintain student discipline
 Manage assigned responsibilities
 Promote desirable conduct
 Promote district programs
 Promote participatory management
 Provide leadership
 Select/supervise/evaluate staff
 Supervise student activities
 Supervise and evaluate staff
 Supervise physical plant
 Supervise students

CHAPTER V. SUMMARY, CONCLUSIONS, AND RECOMMENDATIONS

Over the last few decades skillful evaluation of educational personnel became a valued part of the school improvement process. School administrator and teacher evaluation had been heavily researched and the results have been tied into effective schools' efforts and accountability. In the early 1990s, evaluation of educational support personnel emerged. As a result, various criteria, examples and models exist that are currently in use by school districts today. In the mid 1980s, a few researchers determined that the school secretary was a valuable part of the success of a school. These researchers established standards on what the secretary does in his or her job on a daily basis. Even though these two trends have evolved simultaneously, nothing exists to combine what the school secretary does in his or her work with an evaluation system that is reflective of his or her job.

Summary

This case study was part of projects between Basehor-Linwood School District #458, Fremont County School District #2, Lincoln County School District #1, Western Hills Area Education Agency #12, and the School Improvement Model (SIM) team from Iowa State University. The purpose of this study was to analyze and compare data obtained through examining the critical work activities of each of the secretaries in the sample listed above and to answer specific questions regarding the development of a prototype evaluation model for the educational secretary. The research

methodology used in this study was qualitative and included holistic inquiry, using humans as data gathering instruments, purposive sampling, data analysis, development of grounded theory, emergent design, and confirmation interviews.

The sample group included a total of 46 educational secretaries, 14 of whom worked at the school district building level, nine in school district central offices, and 23 in the Western Hills AEA. Specific activities included in the development of the prototype evaluation system included:

1. the development of philosophies and procedures;
2. secretaries identifying their critical work activities (CWAs);
3. secretaries timelogging their CWAs;
4. analysis of time worked in the CWAs by building level, central office, and AEA secretaries;
5. the development of a summative evaluation report that includes job specific responsibilities for the educational secretary; and
6. the development of criteria and procedures for evaluation, along with a timeline for completion of both summative and formative portions based on the consistencies of all four educational entities in this study.

Conclusions

The results of the study suggest that there is a need for an evaluation model for educational secretaries. The results also suggest that the model should be developed based on criteria that are consistent

with the everyday duties and responsibilities of the educational secretary.

The stakeholders' groups, planning the evaluation of secretaries (among others), agreed with the following conclusions that were presented as problem elements at the beginning of this study.

1. Identify the roles and responsibilities of the educational secretary. Job specific responsibilities for building level, central office, and AEA secretaries were determined by analyzing the results of the timelogging of the various CWAs identified by the four sample groups in the study. Each secretary was also provided the opportunity to provide comments through survey questions in a one-on-one interview. Roles and responsibilities were also differentiated through analysis of job descriptions provided by each of the districts in the study. It is evident that the secretary's role in the organization is different from the role of others.
2. Determine specifically what tasks the secretary performs each day on the job on a regular basis. Drawing on information contained in Chapter IV, it is clear that educational secretaries do perform specific tasks directly related to their position as secretary. Specifically, they spend a good portion of each day performing some function related to public relations/communications, computer/clerical activities, and maintaining records.
3. Determine the activities the school secretary performs that are critical to the school's success toward achieving progress toward

its mission. Since the secretary's three most important functions are public relations, clerical/computer work, and maintaining records, one must ask if the performance of these functions on a daily basis is important for each district in performing its mission. Since each of those functions is necessary to operate a school district or AEA from a management perspective, it was concluded that these are the activities that are important in achieving positive results in a school district. The mission of the public school district is to provide instructional programs that are effective for all students. Effective instruction could not exist if a school district or support agency was not well organized and managed. Even more important is the presence of adequate student performance data for use in improving instructional quality.

4. Establish the criteria to evaluate the school secretary. The criteria selected to evaluate the school secretary were based on the percentage of time and amount of days spent working in the various CWAs identified by the secretaries and categorized based on similar patterns. Interview data were also considered. The criteria are listed in the prototype summative evaluation model for educational secretaries in Figure 5.
5. Make suggestions on the model and cycle of steps to use when evaluating the school secretary. Considering the results of the 46 secretaries timelogging their CWAs and stakeholders' deliberations, the prototype model designed in the appendices is

Name

Secretary's Signature

Evaluator's Signature

Date

Date

Directions:

Place a check in the column that best describes the secretary's performance in each of the performance areas. Comments must be written if the secretary receives a "Needs Improvement" or "Unsatisfactory." Comments need to support the rating.

Definitions of Levels of Performance:

Exceeds Expectations: Data show that outstanding performance is clearly obvious.

Meets Expectations: Data show that performance meets satisfactory levels of performance on a consistent basis.

Needs Improvement: Data show that either quality or consistency of performance does not meet standards.

Unsatisfactory: Data show that there is insufficient knowledge or application and lack of quality or consistency of performance.

Figure 5. Suggested prototype summative evaluation form for educational secretaries

Performance Area I: Public Relations/Customer Relations

Public Relations Job Responsibilities/Criteria:

1. Takes/forwards phone messages/administration of telephone
2. Executes communication skills
3. Assists/communication with employees/students/public
4. Serves as receptionist
5. Responds to the needs of the public
6. Consults with parents in an appropriate manner
7. Exchanges information with other agencies and/or schools

EXCEEDS EXPECTATIONS MEETS EXPECTATIONS NEEDS IMPROVEMENT UNSATISFACTORY

EVALUATOR COMMENTS :

SECRETARY COMMENTS :

Performance Area II: Clerical Work/Computer Operations

Clerical Work/Computer Operations Job Responsibilities/Criteria:

1. Word processes, types, and files with accuracy and efficiency
2. Maintains accurate files
3. Copies/prints/designs forms, materials, and documents
4. Generates and/or prepares reports
5. Prepares materials/booklets, etc.
6. Organizes or systematizes correspondence and documents
7. Photocopies
8. Performs data processing
9. Performs computer information retrieval
10. Processes inventory items
11. Processes incoming/outgoing requests
12. Creates catalogs/bibliographies

EXCEEDS EXPECTATIONS MEETS EXPECTATIONS NEEDS IMPROVEMENT UNSATISFACTORY

EVALUATOR COMMENTS:

SECRETARY COMMENTS:

Performance Area III: Management of Records

Management of Records Job Responsibilities/Criteria:

1. Generates and maintains records/general
2. Maintains attendance records
3. Records copies and mails grades/report cards/transcripts, etc.
4. Generates and maintains computer records and forms for records
5. Maintains data base system
6. Maintains filing/record system
7. Performs cataloging of various materials
8. Maintains personnel record system
9. Maintains student record system
10. Maintains records of materials/inventory
11. Maintains various daily logs
12. Maintains planning calendars
13. Records and maintains accident reports
14. Maintains sick leave records

EXCEEDS EXPECTATIONS MEETS EXPECTATIONS NEEDS IMPROVEMENT UNSATISFACTORY

EVALUATOR COMMENTS:

SECRETARY COMMENTS:

Performance Area IV: Assists Supervisor

Administrative Assistant to Supervisor Job Responsibilities/Criteria:

1. Facilitates the needs of the supervisor
2. Performs duties assigned by the supervisor
3. Works with the supervisor to promote the school
4. Informs the supervisor of necessary information

EXCEEDS EXPECTATIONS MEETS EXPECTATIONS NEEDS IMPROVEMENT UNSATISFACTORY

EVALUATOR COMMENTS:

SECRETARY COMMENTS:

Performance Area V: Student Services

Student Services Job Responsibilities/Criteria:

1. Assists with medical needs when appropriate
2. Assists students with needs/general
3. Supervises students/aides in the office
4. Assists with student schedules
5. Assists with student absences
6. Assists in enrolling new students

EXCEEDS EXPECTATIONS MEETS EXPECTATIONS NEEDS IMPROVEMENT UNSATISFACTORY

EVALUATOR COMMENTS:

SECRETARY COMMENTS:

Performance Area VI: Fiscal Management

Fiscal Management Job Responsibilities/Criteria:

1. Receives and deposits monies/counts monies
2. Performs banking/bookkeeping
3. Prepares and processes purchase orders
4. Processes completed jobs
5. Processes incoming jobs
6. Monitors weekly accounts and deposits
7. Prepares billing statements
8. Prepares invoices
9. Prepares budget report for review
10. Prepares travel expense vouchers
11. Maintains and processes payroll/distributes payroll
12. Researches invoices
13. Maintains petty cash
14. Writes bid specifications
15. Maintains budget

EXCEEDS EXPECTATIONS MEETS EXPECTATIONS NEEDS IMPROVEMENT UNSATISFACTORY

EVALUATOR COMMENTS:

SECRETARY COMMENTS:

Performance Area VII: Miscellaneous

Miscellaneous Job Responsibilities/Criteria:

Evaluator and secretary list the other activities the secretary performs:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

EXCEEDS EXPECTATIONS MEETS EXPECTATIONS NEEDS IMPROVEMENT UNSATISFACTORY

EVALUATOR COMMENTS:

SECRETARY COMMENTS:

a recommended model for the evaluation of the educational secretary.

6. Determine if job descriptions actually align with the activities the secretary performs. In this study, the job descriptions served as a tool for the secretaries to determine which CWAs each of them wanted to timelog during the 20-day timelogging activity. Since the job description served in this capacity, it was possible to determine if job descriptions align to what the secretary does in her job. In addition, the secretaries were also interviewed after the 20-day timelogging activity and their input was included to update job descriptions in each of the school districts and AEA.
7. Determine if there is a need to develop separate criteria for the different secretarial positions within the educational setting. The research in Chapter II suggested that there are specific domains in which the secretary spends a large portion of his or her time working. Clearly some differences exist between building level, central office level, and AEA secretaries in how they spend their time. Specifically, secretaries at the building level encounter more people on a daily basis primarily because they deal with more students. Secretaries at the central office level tend to deal more with fiscal management related activities than do secretaries at the building level or AEA. Depending on the organization, certain secretaries may specifically perform a specific task because it is his or her specific responsibility to

do so. This is often true in the area of fiscal management as one or two people per district are generally assigned this function. Therefore, there is a need for criteria to be applied differently for the variations in the three positions.

8. Determine if certain activities performed by educational secretaries are seasonal because of the cycle of the academic year. In addition to timelogging, all secretaries were interviewed. During the school year, the functions that a secretary performs remain rather consistent. Most secretaries will spend a large portion of their day performing public relations, clerical/computer, and records management activities consistently throughout the school year. However, specific projects do occur at different times of the school year that require variations from the day-to-day routine. Specifically, each secretary has certain activities to perform at the beginning of the school year and at the end of the school year that vary from the day-to-day routine. At the end of the year, secretaries tend to spend a large portion of time managing records. During the summer months, building level secretaries spend less time in public relations and student activities because students are not in school. Almost all high school secretaries reported that they had something to do with the organization of prom, awards ceremonies, and graduation in the months of April, May, and June. May and June are also months that secretaries spend a significant portion of time generating and preparing district and state

summary reports. It is also noted that at the end of the school year almost all building level secretaries reported that they were involved in taking inventory of books and supplies.

9. Propose adequate steps in conducting the summative evaluation. Suggested steps for conducting the summative evaluation are proposed in Table 15 and are based on the steps recommended by stakeholders for each of the four educational groups used in this study.
10. Determine if there is a relationship between the secretary's amount of time spent in managerial tasks with the amount of time the building level principal can spend in instructional related activities. In this study no direct relationship could be established, because principals and secretaries did not identify the same CWAs to be timelogged. This could be cause for further studies and might be able to be completed if the methodology were designed to test such differences. It is apparent, however, that someone has to perform all the functions that a secretary does. If a principal did not have a secretary, it would be rather difficult for him or her to perform instructional related activities if he or she was performing the functions of the secretary.

One leading conclusion can be drawn from this study that was not addressed originally as an element. Apparently, the educational secretary must be very good at performing clerical and computer related functions and he or she must be a person who likes to work with the

Table 15. Components of procedures to evaluate educational secretaries

Prototype:
Operational Procedures for Secretarial Staff Performance Evaluation

This prototype suggests that the evaluation consists of both Formative and Summative components. This can be used as a framework for districts implementing an evaluation process for secretaries.

Step 1. Orientation:

A conference should be held between the secretary and supervisor during the month of September. At the conference all rules, forms, criteria, procedures, and timelines will be reviewed. The secretary and supervisor will also agree to the types of work samples that will be collected and reviewed at the end of the evaluation period.

Step 2. Self-evaluation:

Each secretary will do a self-evaluation during the evaluation period. The self-evaluation will be a one-page summary of what the secretary views are his or her strengths, significant contributions, areas to improve, and professional goals. The summary will be turned into the supervisor prior to April 1st of the year in which the secretary is being evaluated and the supervisor will review this to discuss at the summative conference.

Step 3. Data Collection:

Input from peers, students, community, parents, building principals, and the secretary being evaluated will be used and work samples will be collected. Anything in written form will be kept in a file and will be provided to the secretary during the summative conference. All input will be reviewed at the summative conference.

Step 4. Formal Observations:

The supervisor will conduct two formal observations during the year in which the secretary is being evaluated. One observation will be completed prior to December 1st and the other prior to May 1st in the calendar year. The formal observations will be announced and mutually agreed upon by the secretary and supervisor.

Step 5. Postobservation Feedback Conferences:

Within 7 working days of each formal observation, a feedback conference will be conducted between the secretary and the supervisor and a written summary of the conference will be completed by the supervisor for the secretary to sign within 5 working days of the conference. The purpose of the conference is to review what the supervisor observed, share feedback, provide the secretary with a chance to elaborate on the observation and discuss positives and concerns.

Table 15. Continued

Step 6. Summative Evaluation Conference and Report:

By June 1st of the year in which the secretary is being evaluated the supervisor shall conduct a summative evaluation conference and report using the prototype summative evaluation form. During the conference the secretary will review the evaluation form, receive feedback from his or her supervisor, and discuss goals for the following year.

public. He or she must also like handling multiple tasks, as the pace of the work is fast and furious.

Limitations

The limitations relative to this study were as follows:

1. This study was limited to three public K-12 school districts, one in Kansas, two in Wyoming, and one public area educational agency located in Iowa. Results might be able to be generalized in the United States, however, they cannot be generalized to other countries. Results cannot be applied to private schools and colleges/universities.
2. The review of the literature did not reveal any specific model of performance evaluation for education support personnel.
3. This study only determined specifically the amount of time and frequency of occurrence the secretary spent performing certain work activities and did not determine how well the secretary performed each function.
4. The researcher was not a participant in gathering the data for Fremont County or Western Hills AEA. Thus, the researcher had to rely on data collected from these two organizations through the ISU SIM team.

Discussion

A review of the literature, analysis of the percentage of time the secretaries spend working in the various work activities, and

interviewing the secretaries revealed that secretaries are the heart and soul of the school's organization. Glenn (1937), Fried (1988), Hoffman, Rentschler, and Richards (1991), and Stovall (1993) revealed that the secretary's role in public relations was important. The findings in this study suggest the percentage of time the secretaries spend working in the public relations domain is nearly an average of 15 percent. Yet, no attempt has been made to develop a summative evaluation report for the secretary that defines the critical work activities that relate to public relations. In addition to public relations, Casanova (1991) and Rimer (1984) defined the job clusters of the secretary, yet nothing has been developed in a summative evaluation report that allows for the educational secretary to be evaluated on how well he or she works with students, performs clerical tasks, manages records, or assists his or her supervisor.

Stronge and Helm (1991) came the closest to developing an evaluation model and process for educational secretaries when they developed the Professional Support Personnel Evaluation Model. This model is a good beginning base. It allows a school system to define and choose the criteria for which it may evaluate support personnel, and it coordinates evaluation results with system needs. However, this model does not link the exact work activities the secretary performs on a daily basis with a summative evaluation report. Van Gorp (1993) developed an evaluation model and process for support personnel in an area education agency. Her model included findings on the critical work activities of AEA secretaries. However, her research did not specifically suggest a model

for evaluation of the educational secretary in the public school systems. Smith's (1993) 360 degree feedback evaluation model is used in the business sector with business secretaries; however, the work activities performed by secretaries in the business sector differs from those of the educational secretary.

Reynolds and Tramel (1971) found that the educational secretary was the most important person that a principal can use in the change process. The findings in this study support the fact that the secretary is indeed very important. Evidence clearly demonstrates that the secretaries are the ones who do all the "dog work" or things the principal or superintendent does not want to do. Yet, what is alarming is that secretaries are rarely given feedback on what they do through an evaluation process. If secretaries are without a doubt so vital to the success of a school, why is it then that school administrators do such a horrendous job of evaluating them? Perhaps this is because superintendents and principals do not value evaluating their secretaries or they are just too plain lazy to take time to do it. Perhaps administrators take their secretaries for granted and they fail to evaluate them because they view the secretary as someone who is meek and afraid to accept feedback. In the few school districts that do evaluate secretaries, the secretary is normally evaluated by some process and instrument that does not directly relate to the critical work activities he or she performs on a daily basis. Often the secretary is evaluated by some supervisor from another building who does not work with him or her on a regular basis.

Implementing an evaluation process for the educational secretary should be handled with great care. During this study, it was apparent that secretaries are more than willing to discuss the specifics of their job and how important they are. They were flattered that someone was paying attention to the importance of their job. However, secretaries do not trust the evaluation process very well. After going 10 to 25 years or so without ever being evaluated, they had visions of being disciplined or given negative feedback if they participated in the evaluation process. It should be noted that secretaries indicated that they do want feedback through the evaluation process. In their opinion, evaluation is fine as long as they are being evaluated on criteria that specifically relates to their job and as long as the process is objective. Since the Iowa State SIM evaluation process is headed by a group of stakeholders in each district, these committees need to be aware of how the secretaries might initially react to evaluation when they are designing the district's process for evaluation of secretaries. The stakeholders need to proceed with an empathic attitude and each stakeholder committee should have representation from a secretary in the group.

In summary, it is important to point out that in any school, the secretary is the head of the central nervous system. He or she is the foundation and backbone of the organized school. He or she is never the one to be given the credit for the success of the school and the success of the administrator in charge. Yet administrators know all too well that without the secretary's valuable services, the school would be in mass

chaos and student failure would result. It's time to recognize the work of the secretary. It is time to evaluate him or her.

Recommendations for Practice

One of the purposes for researching the roles and duties of the secretary and the amount of time he or she spends in any working activity was to put together a model that other school districts or AEAs can use to get started in the evaluation of educational secretaries. Using the prototype model should save a district some time and assure a district that secretaries are being evaluated on a model that was developed from research. Recommendations for practice and use of this prototype secretary evaluation model include:

1. Use the CWAs chosen by the secretaries in this study as a base when choosing activities to be timelogs.
2. Have secretaries review their job descriptions and compare them with the prototype CWAs they have chosen.
3. Look at the averages of time spent in each of the major work categories as suggested by the prototype and compare. If differences appear to be significant, add or delete categories for secretary evaluation. For example, if after the 20 days of timelogs one finds that a secretary spends less than 3 percent of his or her time in the public relations category, one might want to label that section of the summative evaluation form as not applicable.

4. Use the prototype instrument as a base for determining the summative evaluation and add general district criteria and any other criteria that need to be added.
5. Use the criteria for procedures and timelines as suggested in the model as a basis and make district adjustments as appropriate.
6. Most importantly, superintendents and principals should learn from this study that the secretary's job is an important job. They should spend more time evaluating their secretaries and use the model and process to provide formative coaching to the educational secretary.
7. Try the model on a few secretaries for one year as a pilot test. Implement the whole model after adjustments have been made.

Recommendations for Further Research

Similar studies to this could be duplicated, however, this case study does not allow for exact replication. Additional case studies in the area of secretary performance evaluation could serve to support or refute the findings and recommendations identified in this case study. Further studies might address the following research questions:

1. Is it possible to develop a prototype evaluation system for maintenance/janitorial staff, instructional aides, school food service workers, and school bus drivers?

Perhaps each of the support staff who are so important to the day-to-day operations could participate in CWA timelogging. Each of their CWAs could be categorized to a summative evaluation report that is appropriate

to their positions. The methodology in this study could be easily applied to studies of this nature.

2. Could there be a research design that allows one to study how the secretary's time spent in certain work activities positively impacts the principal's ability to devote time to instructional related activities?

Perhaps it is possible to conduct a quantitative analysis of data comparing the school principal's effectiveness in instructional leadership with that of the effectiveness of the secretary's performance in performing managerial tasks. A researcher might want to use a large sample of principals and secretaries and analyze the various work categories with percentage of time devoted to a given work activity and compare it with other work activity time to see if there is any relationship.

3. Could there be a research design that allows for the study of determining if there is a relationship between secretary job performance and student achievement?

Perhaps, using a multiple regression, a researcher might be able to determine if there are any relationships between student achievement and secretary job performance. A suggested method of study would include doing some type of comparison of student gains on pre- and posttest achievement tests to amounts of time the principal spends working in teacher evaluation, leadership, and curriculum development, and the amount of time the secretary spends in tasks related to management of the school.

4. Based on knowing what it is a secretary does, could there be a research design that studies merit pay for secretaries and how that relates to secretary job performance?

As indicated in Chapter II, secretary pay is relatively low. Perhaps using the prototype evaluation system as designed by this study, one might be able to develop a suggested merit pay system for secretaries depending on how they perform on their evaluations.

5. Based on the fact that administrators do not take the time to evaluate secretaries and now that a prototype model and process exist, perhaps in years to come a researcher might decide to find out how many school districts have adopted formal evaluation processes for their secretaries. In a decade, it would be rather intriguing to see if more than 50 percent of the nation's school districts have adopted such a practice.

Regardless of the methodology chosen to further research the educational secretary, there is a need for other studies. The more attention the educational secretary receives, the better off the educational secretary will be.

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APPENDIX A. STATEMENTS OF BELIEF

STATEMENTS OF BELIEF

1. Leadership, facilitation, services.
2. Work together for children.
3. Communication between teachers, administrators, students, parents, and community.
4. Parents are important to educational system.
5. High expectations--expect the best from us.
6. Being there. . .presence of our team (interdisciplinary--more than one focus based on individual needs).
7. Openness and honesty (schools, staff, media).
8. Inter-division collaboration (i.e., technology).
9. Educate and empower parents.
10. Parents, teachers, administrators serve as "scouts."
11. All students can learn.
12. Satisfying place to work (safe place to be different; interest and trust in each other as human beings).
13. We serve everyone and do all things (or we do the most we can, the best we can).
14. Respect and autonomy.
15. Extremely multi-talented (high level of expertise); we are appreciated.
16. Wide variety and high level of skills to bring to schools--communication necessary between LEAs and AEA.
17. Serve an advocacy role (interpreters, linkage between handicapped/gifted and talented and AEA).
18. Highly diverse group of people who want to grow (we are empowered--there's a multitude of teams).
19. Rule and procedure bound.
20. "Possibilities" is an area of motivation. Celebrate differences and have courage of convictions. Artistic agency.

8. **Performs non-classroom responsibilities.**

- a. The teacher completes reports accurately and returns them promptly.
- b. The teacher accepts and fulfills responsibilities such as recess, hall and lunchroom duties, sponsorships, activity supervision, etc.
- c. The teacher meets the workday time requirements.
- d. The teacher attends and is prompt for meetings.
- e. The teacher shows a willingness to serve on building and district-wide committees.

THE EVALUATION/STAFF DEVELOPMENT PROCESS

- 1. All staff members will be formally evaluated each school year.
- 2. Probationary teachers will be evaluated twice each year.
- 3. These evaluations can be given at any time if a teacher is not doing acceptable work in one or more of the eight areas for good instruction.
- 3. These evaluations may be completed at any time.
- 4. Additional evaluations can be given at any time if a teacher is not doing acceptable work in one or more of the eight areas for good instruction.
- 5. An evaluation form needs to be completed as soon as possible if it is determined that a staff member is not performing at an acceptable level. The principal will indicate that they are in intensive care and formulate a program to remediate the problem.

STAFF DEVELOPMENT

- 1. Each staff member will have a staff development plan which is agreed upon between the member and the principal.
- 2. The **Job Target** approach may be utilized to accomplish the development plan.
- 3. Two or more **Job Targets** will be developed by October 1. These may be formulated and altered at any time.
- 4. **Job Targets** will be written in measurable terms.
- 5. Individual progress will be monitored by the principal during the school year.
- 6. Buildings may pursue staff development concepts as a group.
- 7. District-wide staff development plans will be pursued.
- 8. A principal may need to dictate personal teacher **Job Targets**. This is particularly true if a teacher is deficient in one or more areas of the Standards for Good Instruction.
- 9. **Job Targets** may be modified by the principal.



This brochure is subject to the provisions of official school district policy and administrative procedures and serves as an aid to communication and not as a statement of policy.

STANDARDS FOR INSTRUCTION



FREMONT COUNTY SCHOOL DISTRICT NO. 2



STANDARDS FOR GOOD INSTRUCTION

1. Teaches to a specific objective.
2. Demonstrates a knowledge of subject matter and theories of learning.
3. Teaches at the correct level of difficulty for students.
4. Monitors students and adjusts accordingly.
5. Uses guided practice effectively.
6. Maintains a positive classroom climate.
7. Communicates effectively.
8. Performs non-classroom responsibilities.

STANDARDS FOR GOOD INSTRUCTION FOR SCHOOL DISTRICT NO. 2

1. Teaches to a specific objective.
 - a. The teacher selects a topic for instruction from the district's adopted curriculum and clearly presents it.
 - b. The teacher makes all teaching decisions using criterion, "Does it promote the learning of my objective?"
 - c. All the teacher's actions, explanations, input, response to learner's answers and planned activities will be directed toward the desired learning.
 - d. The district's K-12 curriculum guide(s) are utilized in the planning of daily lessons, units, special projects, etc.

2. Demonstrates a knowledge of subject matter and theories of learning.
 - a. This teacher consistently demonstrates accurate and current knowledge.
 - b. This teacher is one who is in a constant quest for knowledge, keeps up in her/his specialty area and has the insight to integrate new knowledge into what is already known.
3. Teaches at the correct level of difficulty for his/her students.
 - a. This teacher varies method and content to suit individual differences.
 - b. The teacher presents evidence of group and individual differences.
 - c. The teacher helps each student in setting realistic goals for himself.
 - d. The teacher differentiates assignments according to the needs and interest of students.
 - e. The correct scope and sequence of skills and concepts are utilized.
4. Monitors his/her students and adjusts accordingly.
 - a. The teacher moves about the classroom offering students individual help.
 - b. Progress is monitored by personally checking student work and using effective questioning strategies.
 - c. Teaching techniques are according to group as well as individual needs.
 - d. Test results are utilized to monitor progress.

5. Uses guided practice effectively.
 - a. Re-teaching is utilized when necessary.
 - b. The lesson is closed by having students identify what the lesson's learning was.
 - c. Work is assigned and explained based on the day's learning.
6. Maintains a positive classroom climate.
 - a. An atmosphere in which students exhibit an attitude of mutual respect and tolerance is maintained.
 - b. The teacher demonstrates ability to control class through the use of positive techniques.
 - c. The teacher maintains a consistent relationship with students both inside and outside the classroom.
 - d. The teacher fosters a pleasant, relaxed and efficient atmosphere, devoid of sarcasm and ridicule.
 - e. The teacher applies disciplinary measures appropriate to the situation and to the student as an individual.
 - f. Groups are not penalized for individual actions.
7. Communicates effectively.
 - a. The teacher communicates honestly, accurately and with understanding and diplomacy.
 - b. The teacher communicates effectively with students, parents, colleagues and administration.

APPENDIX B. FUNCTIONS AND PHILOSOPHIES OF
PERFORMANCE EVALUATION

WESTERN HILLS AREA EDUCATION AGENCY
FUNCTIONS OF THE PERFORMANCE EVALUATION SYSTEM

The Western Hills Area Education Agency has developed a performance evaluation system for all personnel to serve the following functions:

1. To provide for quality performance through cooperative planning and professional development to meet Agency needs.
2. To facilitate professional growth and supply information that will lead to modification of assignments.
3. To ensure professional, ethical, and competent performance.
4. To reinforce superior performance.
5. To validate the Agency's employee selection process.

PHILOSOPHY OF EVALUATION

The evaluation process is a method by which district employees and the board of trustees are recognized as valuable contributors to the success of students in Fremont County School District #2. Therefore, performance ratings are given to assist them in maximizing their potential.

The purposes of performance evaluation are to: (1) determine that job description criteria are being fulfilled successfully; (2) assure that evaluatees are on task and are accomplishing specific district and departmental goals; (3) identify strengths and opportunities for growth of each evaluatee; (4) provide positive reinforcement and due process, and (5) serve the personnel function of data collection for retention, promotion, transfer or termination.

The skills and knowledge of the evaluator(s) are crucial to the success of the performance evaluation system. The ultimate purpose of the evaluation is student success. The evaluator(s) must be aware of the responsibilities of each evaluatee in that regard. Performance observations must be authentic, documented, and frequent enough to assure that the evaluator(s) is aware of all aspects of the evaluatee's performance. Accountability, integrity, and relevance to the district-approved performance criteria are of utmost importance.

The evaluatee is responsible for accepting the evaluator's presence at the work site and recognizing that the evaluation is a means of identifying a performance profile and goal(s). The evaluatee should willingly accept constructive criticism geared to improvement in designated areas. The evaluatee is expected to employ a positive, progressive effort and attitude in improving performance. Finally, the evaluatee is expected to improve performance where indicated, based upon a mutually agreed upon plan.

Philosophy of Evaluation
Basehor-Linwood USD 458

The evaluation process is a method for continual improvement within the Basehor-Linwood School District for all employees and the Board of Education. Performance ratings are given to assist them in developing and reaching for their potential. Students will benefit as a result of this continual process.

The purposes of evaluation are to: 1) determine that job description criteria are being fulfilled successfully; 2) assure that evaluatees are on task and are accomplishing specific district and departmental goals; 3) identify strengths and opportunities for growth of each evaluatee; 4) provide positive reinforcement and due process; and 5) serve the personnel function of data collection for retention, promotion, transfer, or termination.

The evaluatee is responsible for accepting the evaluator's presence at the work site and recognizing that evaluation is a means of identifying a performance profile and a basis for setting goal(s). The evaluatee should willingly accept constructive criticism geared to improvement. The evaluatee is expected to employ a positive, progressive effort and attitude in improving performance. The evaluatee is expected to improve performance where indicated, using a mutually agreed upon plan.

PHILOSOPHY OF EDUCATION

The purpose of the schools of Lincoln County School District No. 1 is to maximize the learning of all students. The school district must encourage a high-quality education that is both nurturing and challenging. The school environment should advocate such values as respect for others, a love of learning, and positive attitudes. This, in turn, should enhance the positive self-esteem of each student, and smooth the transition from a protected family life to a global community.

The district's intent is to graduate self-sufficient, self-disciplined, life-long learners who can succeed in all significant spheres of life. Our graduates should have the skills, knowledge, and understandings for the required life roles: interpersonal and family relationships, work, civic affairs, global stewardship, culture, and learning. Every student has the responsibility to come to school prepared and willing to learn to his/her potential, and is ultimately responsible for self, family, community, and country.

These beliefs are the shared responsibility of the community, parents, board of education, school district employees and individual students. Thus, it is imperative that everyone is involved, supportive, and committed toward the pursuit and maintenance of educational excellence.

PHILOSOPHY OF EVALUATION

The evaluation process of Lincoln County School District No. 1 will validate the performance of the district employees against set criteria. The purposes are to determine competence, to assess strengths, to provide opportunities for growth, to assure continued growth within the district through differential experiences throughout the career of the employee, and to monitor the organization's hiring procedures.

It is the intent of the district to develop and maintain a comprehensive evaluation system. The district believes that all participants in the process will possess positive, progressive attitudes, with a willingness to grow.

APPENDIX C. PHILOSOPHY OF EDUCATION

WESTERN HILLS AREA EDUCATION AGENCY
PHILOSOPHY OF EDUCATION

The Area Education Agency is a multifunctional intermediate agency whose primary purpose is to affect the quality of educational services to children and provide assistance to local education agencies. The Agency also enhances community planning, regional planning, and networking of agencies and institutions. Among the functions of this agency are: service, leadership, planning, development, coordination, demonstration, and the pooling of ideas, personnel, and resources. The Agency provides assistance to local school districts in meeting state and federal mandates. Close collaboration with Local Education Agencies (LEA) is imperative. The Agency also serves various publics including parents, teachers, institutions of higher education, social agencies, and others.

Students are the reason why this Agency exists. It is the responsibility of the Agency to enhance learning opportunities for each student within each LEA. The Agency encourages local districts to teach lifelong learning, to foster strong student self-concepts, and to develop positive attitudes and beliefs through creating a climate in which students can achieve academically, socially, emotionally, and culturally. Agency personnel serve as motivators, facilitators, and mentors to the district personnel.

Because education is unending, the Agency must stay on the cutting edge of staff development and technology as well as serve as a resource in these areas. Continuing education is of prime importance. The Agency serves as a mechanism for self-renewal through processes such as participatory management and performance appraisal.

PHILOSOPHY OF EDUCATION

The purpose of the schools in Fremont County School District No. 2 is to provide a positive environment for students to reach their individual learning potential. The district's intent is to graduate self-sufficient, self-disciplined adults who can succeed in all significant spheres of life. Our graduates should have the skills, knowledge, and understandings for the required life roles: interpersonal and family relationships, work, civic affairs, global stewardship, culture, and learning. Every student has the responsibility to come to school prepared and willing to learn to his/her potential.

Education will assist each student to develop such character traits as honesty, dependability, ethical behavior, self reliance, promptness, courtesy, tolerance, social responsibility, and respect for the dignity and worth of self and others. Our schools will strive to develop well-rounded young adults who have learned to maintain good health and physical fitness, who are sound thinkers and good decision makers.

Our students will be productive, participating citizens who are self-directed, life-long learners. Because communication skills are of paramount importance, students will learn to express themselves clearly. All students will have opportunities to explore vocational and avocational interests. They will also have opportunities for expression in, and appreciation of, the fine and performing arts.

Philosophy of Education
Basehor-Linwood USD 458

Schools exist to benefit both the individual and society. The district's goal is to graduate self-sufficient, self-disciplined adults who can succeed in all significant spheres of life. To accomplish this, we must graduate students who are prepared for college or other vocational tracks and can make wise career choices.

They should be effective citizens who can compete in a global society, and meet social, civic, and family responsibilities.

Students must do their part to learn and to grow as a responsible member of their school and their community. We believe students must be participative, self-directed, respectful of others' rights and willing to accept the consequences of their actions. Students must learn and obey the rules, regulations, and laws of our society. They must become contributing, productive members of society.

Our schools will assist each student to develop traits of self-discipline and social responsibility. These responsibilities include but are not limited to: honesty, dependability, ethical behavior, self reliance, promptness, courtesy, tolerance, and respect for the dignity and worth of self and others.

Education is a lifelong process. Reading, communicating, critical thinking and using mathematical skills are the basis for informed decision making, cultural appreciation, and healthy use of leisure time.

PHILOSOPHY OF EDUCATION

The purpose of the schools of Lincoln County School District No. 1 is to maximize the learning of all students. The school district must encourage a high-quality education that is both nurturing and challenging. The school environment should advocate such values as respect for others, a love of learning, and positive attitudes. This, in turn, should enhance the positive self-esteem of each student, and smooth the transition from a protected family life to a global community.

The district's intent is to graduate self-sufficient, self-disciplined, life-long learners who can succeed in all significant spheres of life. Our graduates should have the skills, knowledge, and understandings for the required life roles: interpersonal and family relationships, work, civic affairs, global stewardship, culture, and learning. Every student has the responsibility to come to school prepared and willing to learn to his/her potential, and is ultimately responsible for self, family, community, and country.

These beliefs are the shared responsibility of the community, parents, board of education, school district employees and individual students. Thus, it is imperative that everyone is involved, supportive, and committed toward the pursuit and maintenance of educational excellence.

PHILOSOPHY OF EVALUATION

The evaluation process of Lincoln County School District No. 1 will validate the performance of the district employees against set criteria. The purposes are to determine competence, to assess strengths, to provide opportunities for growth, to assure continued growth within the district through differential experiences throughout the career of the employee, and to monitor the organization's hiring procedures.

It is the intent of the district to develop and maintain a comprehensive evaluation system. The district believes that all participants in the process will possess positive, progressive attitudes, with a willingness to grow.

APPENDIX D. PHILOSOPHY OF
TEACHING/INSTRUCTION/CONSULTING

PHILOSOPHY OF INSTRUCTION

The instructional philosophy of the Fremont County School District #2 schools is based on the belief that the teachers' and all district employees' role is to instruct students and facilitate and evaluate learning. The teacher will create a positive learning environment and motivate students with skillful strategies and communication. The ideal teacher is an expert resource person, a positive role model, and a team player. At times the teacher must be an effective laboratory supervisor, advisor, and lecturer.

Instruction will be student-centered with mastery of curriculum outcomes as the goal. Content and process are equally important for effective learning.

The most important elements of quality instruction include (1) clarity, (2) enthusiasm, (3) active student involvement, (4) authentic learning experiences, (5) developmentally appropriate and prescribed content, (6) varied and effective methods of delivery, and (7) evaluation.

**Philosophy of Instruction
Basehor-Linwood USD 458**

The instructional philosophy of Basehor-Linwood School District focuses on the teacher as a facilitator for learning. As a facilitator the teacher will create a positive learning environment, work constructively as a team member, motivate students to learn, and show evidence of continuous professional growth.

Instruction should be student-centered which relates the learning objectives to authentic learning experiences. This effort will require input from the entire school community. The most important elements of quality instruction include clarity, enthusiasm, active student involvement, authentic learning experiences, developmentally appropriate and prescribed content, varied and effective methods of delivery and evaluation. The end result should be students who have the resources to thrive within their total environment.

WESTERN HILLS AREA EDUCATION AGENCY
PHILOSOPHY OF CONSULTING

Consulting is both an art and a science. Consulting, a major responsibility of every Agency employee, is a process with the purpose of promoting positive change that enhances learning. Consulting requires discipline-specific expertise and collaboration with appropriate publics to meet specific needs. Consultants assist in the development of an action plan that can 1) mutually define the issues, concerns, and opportunities, 2) provide selection of possible alternatives, 3) assist with the implementation, and 4) assess the outcomes.

Consultation is a vehicle to provide educational program options, recommendations, leadership, and support in the most efficient and effective manner.

Consultants have a high degree of technical skills. Most important to the role of consultant, however, is having the ability to lead, listen, communicate, and provide meaningful direction for outcomes.

APPENDIX E. PHILOSOPHY OF ADMINISTRATION

WESTERN HILLS AREA EDUCATION AGENCY
PHILOSOPHY OF ADMINISTRATION

ADMINISTRATION

Administration may be viewed as a process of leadership which is both an art and a science. Administrative philosophy must emphasize and utilize four constituent elements and administrative activities. They are planning, implementation, appraisal, and interpretation. The task is to create an environment in which staff contribute to the full range of their talents. A primary responsibility is to challenge staff to discover and develop their creative resources. The Agency leaders are expected to be knowledgeable of programs being provided.

PARTICIPATORY MANAGEMENT

Agency staff desire involvement in decision making on matters which are of significance to them. Participatory management is the preferred style for this Agency.

The same basic competencies for administrative success apply to all levels of administration. Administrators must have professional competencies in their area of responsibility and have personal, immediate, and intense concern for maintaining and improving morale.

LEADERSHIP

Administrative personnel are expected to provide leadership in improving services and see that staff have the resources including, but not limited to, necessary time, sufficient materials, and proper working

conditions for the performance of their job responsibilities. Administrators will clearly inform staff of organizational goals and assist them in working toward these goals. Administrators will offer encouragement and establish a positive climate which promotes individual and organizational goals. The staff will exercise responsible self-direction and self-control in the accomplishment of objectives.

ADMINISTRATIVE PERSONNEL

Administrative personnel must provide the essential vision, leadership, and political support to create the definitive culture which assures a positive climate for staff.

The Chief Administrator works with the Board, administrative staff, and staff associations to carry out the mission of the Agency.

The Chief Administrator maintains a clear vision of the Agency purpose and function and assures the Agency climate is consistent with its stated values. The Chief Administrator provides leadership in developing programs that implement the Agency's goals.

The Chief Administrator represents the Agency with external groups to foster understanding and support and further Agency goals.

Philosophy of Administration
Basehor-Linwood USD 458

Administration is an art, a science, and the process of change. Administrators must be effective educators who can create an environment which allows each employee to contribute to the full range of his or her talent. Administrators must provide the resources and support so that employees can be creative in providing a world class education for students. The science of administration requires an appropriate balance of planning, delivery, appraisal, and interpretation.

Administrators shall promote the interests of all members of the community while keeping service to students as their primary goal. Good administration encourages positive change in a socially acceptable manner. Accountability is an integral part of being an administrator.

Shared Decision Making

Employees clearly desire involvement in decision making on matters of real significance. Employees share the responsibility for decisions made in proportion to their level of involvement. Shared decision making should be used in decisions involving personnel, budgeting, curriculum, facilities, policy formulation, and planning.

Building Administration

Each school building (unit) shall be administered following a philosophy of administration that is in line with the general philosophy and policies of the district. The faculty, support staff, parents, and

students should be involved in creating the building's administrative philosophy.

Building administrators must be able to analyze the effectiveness of the various programs of a school and be skilled in bringing about improvement in quality. They must have a working knowledge of effective teaching methods and be effective in leadership. Administrators must demonstrate this leadership in working with students in academic, social, and extra-curricular activities.

How To Manage

A school district is a complex social organization with many different levels of decision making. With decision making power comes responsibility and accountability. Administrators and other staff members share accountability for delivering excellence and equity in education commensurate with their level of decision making power. Administrators must provide long-range planning activities which will keep staff informed of organizational goals and ensure that all staff work toward them.

The Principal(s)

The principal(s) is the educational leader of the building. The principal(s) must administer with a student-centered philosophy. As the primary liaison between the students, parents, teachers, and central administration, the principal must be an advocate for both the needs and successes of the building unit.

The Superintendent(s)

The superintendent(s) is the keeper and the disseminator of the district's dream and vision. The development and management of the district's budget is a major responsibility for the superintendent(s). The superintendent must be an advocate for both the needs and successes of the district to the community, the educational profession, and the state.

In order to meet the community's needs and enhance school and community relations, the superintendent must lead in seeking community input, facilitating understanding, and interpreting the district's effectiveness in educating students.

PHILOSOPHY OF ADMINISTRATION

Administration encompasses art, science and the process of change. Administrators should be effective educators who create an environment in which employees can contribute their full range of talents. This means he/she has a responsibility to allow and support creativity and provide necessary resources. The scientific component of administration requires an equitable balance of four constituent elements and activities, *i.e.*, (a) planning, (b) delivery, (c) appraisal and (d) interpretation.

Administration shall promote the best interests of the school district as a whole, and to that end, shall adhere to an established code of ethics adopted by the board. Effective administration is a matter of having both good people skills and efficient management skills. Good administration is recognizing potential and encouraging positive change in a socially acceptable manner. Accountability is an integral function of being an executive who is administratively in charge.

SHARED DECISION MAKING

Broad-based, participatory management, centered on a consensus model, is recommended for this district. Shared decision making will be used for giving input into issues of personnel, budgeting, curriculum, facilities, policy formulation, and planning. Employees clearly desire involvement in decision making on all matters of real significance. Employees will share in the responsibility, with decision making proportionate to the level of their involvement.

BUILDING ADMINISTRATION

Each unit level administrator will follow a philosophy of administration, consonant with the district philosophy, which has been cooperatively developed by the unit's stakeholders¹ and custom-tailored for that unit.

Administrators will be knowledgeable of the strengths and weaknesses of various programs and be skilled in bringing about improvement. Administrators must have a working knowledge of current teaching methodologies and strategies. They will be knowledgeable of and able to demonstrate techniques in working with students in academic, social, recreational and extra-curricular activities.

The leadership for positive morale is the administrators' responsibility. Unit administrators will be effective instructional leaders and good managers. Maintaining and improving morale is a shared responsibility of all stakeholders' groups. A well-run unit instills community confidence in the operations of the school.

HOW TO MANAGE

The heart of the educational program is the staff and students. Administrative personnel will provide leadership in improving instruction and see that staff members and students have sufficient materials, proper working conditions, and the necessary time for the performance of their functions.

School personnel will exercise initiative, responsibility and creativity in shared decision making. Administrators will inform staff of organizational goals and ensure that all staff work toward them. Because a school district is a complex social organization, different levels of decision making exist. With decision making power comes responsibility and accountability. All district employees share accountability for delivering excellence and equity in education commensurate with their level of decision making power.

¹ Stakeholders are students, staff, administrators, board members, parents, and community members.

THE PUBLIC

In order to meet the community's needs and enhance school/community relations, the administration and staff will take a leadership role as they seek input, facilitate understanding, and interpret results regarding the district's effectiveness in educating students.

THE SUPERINTENDENT

The superintendent is the keeper and disseminator of the district's dream and vision. The superintendent administers with a child-centered philosophy. The superintendent will represent and be an advocate for both the needs and successes of the district to the community and the state. The superintendent will explore sources of funding and will administer the district's budget in the students' best interests. The superintendent is the primary liaison between those who conduct the operations and the board of trustees as the policy making body. The superintendent will facilitate and maintain ongoing, long-range plans for the management of the programs and facilities.

THE PRINCIPAL

The principal is the implementor of the district's dream and vision. The principal administers with a child-centered philosophy. The principal will represent, and be an advocate for, both the needs and successes of the unit to the superintendent. The principal is the primary liaison between the students and teachers and the teachers and the superintendent. The principal will facilitate unit planning and management within the long-range plans of the district.

AGREE-DISAGREE STATEMENTS ON PHILOSOPHY OF ADMINISTRATION

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INSTRUCTIONS: Read each statement once. Check whether you agree (A) or disagree (D) with each statement. Then in your small groups try to agree or disagree unanimously with each statement as a group. If your group cannot reach agreement or disagreement, you may change the wording in any statement enough to promote unanimity.

KEY: "A" = Agree "D" = Disagree

A D

I. WHAT IS ADMINISTRATION?

- () () 1. Administration is something defined as an art, as a science, or as a process. Actually it embodies each of these.
- () () 2. An administrative philosophy which does not emphasize and constantly utilize in proper balance these four constituent elements and administrative activities: (a) planning, (b) execution, (c) appraisal, and (d) interpretation, is doomed to failure.
- () () 3. Good administration is primarily human manipulation in a socially acceptable manner.
- () () 4. Since the school administrator's basic task is to create an environment in which subordinates can contribute to the full range of their talents, he/she has a primary responsibility to uncover and challenge creative resources.
- () () 5. Administrators are people who usually have had superior success as classroom teachers.
- () () 6. Successful administration really is a matter of having a winning personality. One could be an efficient building manager yet fail as an administrator.
- () () 7. There is prestige associated with being considered an executive who is "administratively in charge."

II. WHO SHOULD DECIDE?

- () () 8. Participative management sounds good but is too time consuming to permit needed and respective action.
- () () 9. An administrator is hired to make decisions and should be capable of doing so without making great demands for teacher involvement.

- () () 10. Routine decisions should be made by administrators, but the greater the importance of a decision, the greater the efforts should be made to gather input from others.
- () () 11. If faculty time is usurped in gaining their insights, then the administrator is obliged to utilize their views.
- () () 12. Teachers clearly desire involvement in decision-making on all matters which are of any real significance.

III. CENTRAL VS. BUILDING ADMINISTRATION

- () () 13. Since a building level administrator has a closer relationship with the staff, he/she must have a more personal, more immediate, and more intense concern for maintaining and improving morale.
- () () 14. The major need for a building level administrator is for technical and human relation skills, while at the central office the administrator's effectiveness depends largely on human relations and conceptual skills.
- () () 15. Central office administration is a separate and distinct entity, thus the individuals performing administrative duties at that level must work within a philosophical framework distinctively different than that for building administrators.
- () () 16. The same basic competencies for administrative success apply to all levels of school administration.
- () () 17. Central office administrators tend to prefer building administrators who are good managers over those who are instructional leaders.
- () () 18. Building level administrators, along with the "directors" on the central office staff, should be knowledgeable of the strengths and weaknesses of various programs and be skilled in bringing about improvement in them.

IV. The Principal

- () () 19. A principal should be knowledgeable in, and be able to demonstrate techniques of working with, students on both a large and small group basis in developing realistic student government along with social and recreational activities for the students.

- () () 20. Elementary and secondary principalships are so clearly different in scope and responsibility that the same expectations cannot apply.
- () () 21. Building level administrators must be thoroughly knowledgeable about current teaching methodologies and strategies.
- () () 22. It is essential that building level administrators teach periodically to demonstrate their capability.
- () () 23. A building level administrator should not pretend to be a "master" teacher but stick to building and program management.
- () () 24. If the community does not observe a well-run building, it loses confidence in other operations of the school.
- () () 25. Schools in the district should be organized so that the principal is the chief administrator of the building, therefore is held responsible for all management details.
- () () 26. Each building level administrator should have a philosophy of administration which has been cooperatively developed by staff/administration and custom-tailored for that building "community."

V. HOW TO MANAGE

- () () 27. Subordinates will exercise responsible self-direction and self-control in the accomplishment of worthwhile objectives that they understand and have helped establish.
- () () 28. The heart of an educational program is the staff. Administrative personnel should provide leadership in improving instruction and see that staff members have the necessary time, sufficient materials, and proper working condition for the performance of their functions.
- () () 29. Administrators can gain staff acceptance and support best through clearly established organizational procedures and efficient office management.
- () () 30. The majority of personnel are capable of exercising far more initiative, responsibility, and creativity than their present jobs or work circumstances require or allow.

- () () 31. Staff members appreciate administrators who clearly inform them of organizational goals and insist that they work toward those goals.

VI. THE PUBLIC

- () () 32. Since a low degree of public understanding will limit the effectiveness of the school, administrators are obliged to make public relations their top priority goal.
- () () 33. School administrators are first and foremost guardians of the public interest and, therefore, must promote that administrative role at the expense of the interests of their staffs.
- () () 34. Generally speaking, schools are not well managed and are not very responsive to the desires of the community public(s).

VII. THE SUPERINTENDENT

- () () 35. At the top level of administration, the conceptual skill becomes the most important.
- () () 36. A superintendent should represent the students since board members represent various adult pressure groups in the community.
- () () 37. A superintendent should primarily be a politician so that he/she can help the community set their goals and reach them.

APPENDIX F. KEY QUESTIONS

KEY QUESTIONS

Operational Procedures--Administrators

I. The Evaluation Cycle

A. Self-evaluation

1. Should the system include a self-evaluation component? If yes,
2. How often should a self-evaluation be completed?
3. Should a special form be developed for this component? Why or why not?
4. Should this be an optional component? Why or why not?

B. Evaluation Team

1. Which administrator serves as evaluator for each level of administration?
2. What sources of input should be included--other administrators? staff? students? parents? community members?
3. How should this input be collected?
4. Should input from these sources be optional? Why or why not?

C. Orientation Conference

1. Should this step be included? If yes,
2. When should this conference be held?
3. What topics should be discussed?

D. Data Gathering

1. How is this step accomplished--formal observations? informal observations?
2. What kind of work samples should be monitored? (schedules? memos? staffing reports? inventories? requisitions? other?)
3. How is unsolicited input from students, parents, staff and/or community handled?
4. How long should formative data materials be kept on file?

E. Formative Conferences

1. How frequently should formative conferences be held?
2. Should written feedback be provided? Why or why not? Is a special form needed?

F. Summative Evaluation Report

1. By what date should this report be completed?
2. Should a copy of this report be available to the administrator before the conference?
3. Where should this report be filed?

G. Summative Evaluation Conference

1. By what date should this conference be held?
2. Who schedules it?
3. What is discussed during this conference?

H. Response Statements

1. Should there be an opportunity to write a response statement to the summative evaluation report? If yes,
2. When should the responses be written?
3. How is the response statement related in regard to the evaluation file?

I. Targets/Objectives

1. When should targets be written?
2. How should targets be identified?
3. How many targets should be written per cycle?
4. What should this component be called for your school organization?

II. Use of Summative Evaluation Reports

- A. Should these data be summarized for all administrators in the school organization? Explain.

- B. Should the chief executive officer review all of the summative evaluation reports? Why or why not?
- III. What types of recognition for outstanding performance should be used?
- IV. Should there be a procedure for administrators demonstrating marginal performance?
- A. If yes, what timeline should be provided for these activities?
- V. In-service/staff development activities for administrators
- A. Who plans these activities?
 - B. Who coordinates these activities?
- VI. Timeline
- A. What timeline should be used for?
 1. Self-evaluation
 2. Observations
 3. Response statements
 4. Job Improvement Targets
 5. Summative Evaluation Reports

KEY QUESTIONS

Test-and-Try

- I. What constitutes an appropriate field test of the new system?
 - A. When should the field test take place and for what period of time?
 - B. Who should be involved?

- II. Who should receive training and orientation about the new system?

- III. What questions should be answered as a result of the field test?
 - A. Which operating procedures should be changed?
 - B. Which criteria should be eliminated or revised?
 - C. Others . . .

- IV. How should the suggestions for the revisions be handled? Should they be sent to the field coordinator? sent to the lead consultant? discussed at a stakeholders committee meeting?

KEY QUESTIONS

Philosophy and Objectives

I. Philosophy of Education

- A. What is the purpose of your school?
 - 1. for individual benefit?
 - 2. for social benefit?
- B. What are the district's goals? (Consider the development of student knowledge and skills, career awareness, citizenship and civic responsibilities, social relationships, values, self-understanding, personal health, job skills, and other relevant areas.)
- C. What responsibilities do students have?
- D. Should school reflect culture as it is and/or provide a means for altering it?
 - 1. To what extent should students learn the current values of society?
 - 2. To what extent should students learn to constructively criticize, reform, and change in order to be compatible with a changing society?
- E. Education is a life-long process. What implications does this concept have for your school?

II. Philosophy of Evaluation

- A. What should be the purpose(s) of evaluation?
- B. Define several responsibilities of the evaluator.
- C. What are the responsibilities of the evaluatee?

III. Philosophy of Instruction

- A. What is the major role of the teacher? What other roles are important?
- B. Should instruction be student-centered or subject-centered?
 - 1. Is mastery of a vast fund of knowledge a valid goal?

2. Is knowledge a means to an end?

C. What are the most important elements of effective instruction?

IV. Philosophy of Administration

A. What are the major responsibilities of the members of the administrative team?

B. What are some important topics about which administrators should be knowledgeable?

C. What are some important management and human relations skills that effective administrators must possess?

D. What process should be used in making important decisions?

Philosophy of Consulting

- I. What is consulting--an art? a science? or a process?

- II. What is the primary purpose for employing consultants in an intermediate agency?

- III. What is their most important role?

- IV. How much involvement should these persons have
 - A. in the selection of teaching methods and procedures for improvement of instruction?

 - B. with the development of curriculum in the districts being served?

 - C. with monitoring the implementation of curriculum in the districts being served?

- V. Persons serving in this role need a high degree of
 - A. technical skills?

 - B. conceptual skills?

 - C. human relations skills?

Philosophy of Education

- I. What should the purpose of an intermediate agency be? To what extent should it reflect the belief that the agency serves students?
 - A. Define excellence. (Should this be the primary goal?)
 - B. How should the agency be responsible for the learning environment in the schools it serves?
 - C. Should the agency ensure that all students attain mastery levels of learning? Why or why not?

- II. What should the agency do in regard to programs for students in the schools it serves?
 - A. Should school district programs encourage development of attitudes? Why or why not?
 - B. Should school district programs foster healthy self-concepts? Why or why not?
 - C. Should students be skilled applicants when they graduate from the high schools? Explain.
 - D. Should the agency assist school districts when mastery levels of learning are identified? Explain.

- III. Should the agency assume responsibility for helping districts teach students how to cope with a changing society? Explain.

- IV. Education is an unending process. What does this mean to an intermediate agency? How should this statement be clearly identifiable within the agency?

Philosophy of Performance Evaluation

- I. What should the primary purpose be?
- II. What are other purposes of this process?
- III. Why is it important that this process be a cooperative effort?
- IV. How should evaluation data be used
 - A. in making personnel decisions?
 - B. in planning staff development programs?
 - C. other?
- V. What should the expected outcome of the evaluation process be?
- VI. Why should an effective performance evaluation process include
 - A. research-based criteria?
 - B. formative evaluation procedures?
 - C. summative evaluation procedures?
 - D. provisions for due process?

KEY QUESTIONS

Operational Procedures

I. On a 1-5 scale, how do you feel about including the following components for a person who is on full-cycle evaluation?

	Low				High
A. Planning Conference	1	2	3	4	5
B. Self-evaluation	1	2	3	4	5
C. Formative Components (Data gathering)					
1. Scheduled Observations	1	2	3	4	5
2. Nonscheduled Observations	1	2	3	4	5
3. Feedback Conferences	1	2	3	4	5
4. Support Data and Input	1	2	3	4	5
a. Work samples	1	2	3	4	5
b. Feedback from peers	1	2	3	4	5
c. Feedback from "others"	1	2	3	4	5
d. Unsolicited feedback	1	2	3	4	5
D. Summative Components					
1. Report/Conference	1	2	3	4	5
2. Professional Growth Plan	1	2	3	4	5

II. WHO is primarily responsible for the supervision/evaluation process for each person who is on cycle?

III. Should there be other persons who provide input into the process?

Yes No Explain.

IV. How frequently should persons be on full-cycle evaluation?

Annually

Once every two years

Once every three years

V. If the cycle is other than annual, should there be a mini-cycle process?

Yes	No	If yes, what components of the full-cycle should be included?
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APPENDIX G. MISSION STATEMENTS

Mission Statement

The mission of Western Hills Area Education Agency is to assist area educators in helping all learners reach their potential by equitably providing specialized services, leadership, and resources which can be offered most efficiently and effectively on a regional or cooperative basis.

APPENDIX H. EVALUATION PROCEDURES

WESTERN HILLS AREA EDUCATION AGENCY
PERFORMANCE EVALUATION PROCEDURES

Performance evaluation for all employees in Western Hills Area Education Agency is an on-going, three-year cycle with certain components optional by discipline. The person to whom the employee reports on the organizational chart is responsible for the evaluation process. The evaluation procedures provide the framework for assessing an employee's performance as it relates to the established criteria.

The cycle begins with an Individual/Professional Development Planning Conference, which includes a self-evaluation. Following that activity there are two components in this process: formative and summative. The formative component includes observations, feedback conferences, and supporting data and input. These data provide the opportunity for feedback to assist with improving performance. In the summative component information is used from the formative data to make professional judgments about the quality of job performance in accordance with the established criteria. Summative evaluation includes a report and an end-of-cycle conference.

I. Individual/Professional Growth Planning Conference/Self-evaluation

- A. This conference will take place prior to October 1 of each school year for returning employees and within the first two weeks for new employees.
- B. The conference is held to set goals, review criteria, discuss procedures, agree upon timelines, review due process, and discuss the goals of the Agency.
- C. It provides the opportunity for two-way communication.

- D. A self-evaluation allows one to review his/her performance and to establish goals.

II. Formative Components

A. Observations

- 1. Formal observations will be mutually scheduled.
- 2. When informal observations are used as a part of the evaluation, the evaluator will inform the evaluatee as to the time it begins and its focus.
- 3. The minimum number of formal observations during a cycle ranges from one (1) to three (3). Either party may request more observations.
- 4. The evaluator observes the evaluatee's job functions, performance, and productivity and identifies strengths and areas for growth.

B. Feedback Conferences (Formal Observations)

- 1. A feedback conference will follow each observation.
- 2. The purpose is to review the data that were gathered, enriching the employee's capabilities.
- 3. These conferences will have both immediate feedback after an observation followed by a written summary within a week.

C. Supporting Data and Input

- 1. These are important because they help the evaluator arrive at conclusions during the summative components.
- 2. Work samples should be pertinent to the job and relate to the criteria in the system. They will vary according to the position.
- 3. Relevant feedback from the clients being served, both solicited and unsolicited, may be used. The feedback will be shared if used.

III. Summative Components

A. Report

1. At the end of the cycle the evaluator reviews the data which were gathered and completes the summative evaluation report.
2. The report is to be completed no later than the last contract date of the employee's work year.

B. Conference

1. A summative conference is held at the end of the cycle to discuss the evaluatee's performance relative to the evaluation criteria.
2. This conference is to be held no later than the last contract date of the employee's work year.

IV. A mini-cycle of the evaluation process will be conducted during the non-SER years. Components will include 1) monitoring and evaluating progress toward Agency goals, and 2) monitoring and evaluating progress toward the Professional Development Plan.

V. Due Process

- A. All parties have had representation in the design and development of the evaluation system. Knowledge and understanding of performance expectations are provided for employees in AEA 12 through distribution of this handbook.
- B. Every employee is provided an opportunity for familiarization with the system, its procedures, and its use.
- C. Employees are provided rebuttal opportunity as a part of each reporting cycle.
- D. All reports of unsatisfactory performance must be in writing and must enumerate shortcomings in a specific manner.
- E. Each employee is provided access to the file of his/her evaluation reports located in the Agency's officially designated personnel file.

Classified Staff Performance Evaluation Procedures

Formal evaluation provides the opportunity to assess and evaluate the professional performance of a staff member, with the development of the staff member's potential being the primary purpose of the evaluation system. The procedures outlined in this section set forth the conditions under which evaluations are made.

The superintendent or his/her designee is responsible for the evaluation of classified staff members. The evaluator may, however, seek assistance from other appropriate personnel. Staff members may solicit input about their performance from students, colleagues, parents, and/or community members. Information gathered from these sources may be shared with the evaluator at the staff member's discretion.

Through the evaluation process, strengths and areas that need improvement will be identified and communicated to staff members. Appropriate guidance and support will be provided as needed to assist in improving a staff member's performance.

The evaluation cycle consists of both formative and summative components. During the formative process, performance is monitored and data are gathered. Summative evaluation is used to provide an overall assessment of staff performance.

Staff members will participate in an abbreviated cycle of evaluation twice each year. The following procedures will be used.

Self-Evaluation

- A. Each staff member completes a self-evaluation using the summative evaluation form.
- B. The self-evaluation helps the staff member become aware of evaluation criteria, serves as a source of discussion at the summative conference, and suggests possible areas for improvement.
- C. The self-evaluation form will not become part of the staff member's file unless requested by the staff member.

Evaluation

A. Orientation Conference

1. During August all classified staff will be involved in this conference in a group setting.
2. During the conference the handbook will be discussed.

B. Individual Conference

1. The individual conference is to be held during September.
2. The purpose of the individual conference is to exchange information regarding the changes in work assignments of the staff member and to expand and/or revise the instrument by adding Project Action Plans.

C. Progress Checks

1. A progress check will be completed by the evaluator in the fall and in the spring.
2. Progress checks will be documented by a memo, and a feedback conference will be provided within five (5) working days.

D. Summative Evaluation

1. Summative Reports (two per year)
 - a. The Summative Evaluation Report is used to rate the staff member's performance in relation to the criteria.
 - b. The completed report is placed in the staff member's personnel file in the central office.
 - c. One report is completed before December 1; a second is completed before April 1.

2. Conference

- a. The evaluator holds a summative evaluation conference with each staff member prior to December 1 and April 1.
- b. The report should be given to the evaluatee two days before the conference.
- c. During the summative conference the evaluator discusses judgments and conclusions based on the progress checks conducted during the formative process.
- d. After receiving the Summative Evaluation Report, a staff member may file a written response within ten (10) working days. The response is attached to the Summative Evaluation Report and included in the staff member's personnel file.
- e. The evaluatee and evaluator will jointly propose and write a Professional Growth Plan.
- f. If, during the year any classified staff member's assignment changes significantly, the cycle begins again with the individual conference (Item B above).

OPERATIONAL PROCEDURES FOR CLASSIFIED STAFF PERFORMANCE EVALUATION

This cycle of procedures sets forth the conditions under which the supervision/evaluation process will be conducted. This process will be used annually and conducted by whomever the employee reports to according to the organizational chart of Lincoln County School District No. 1. The purpose is to identify strengths and areas for growth and will be communicated to the staff member. Support and guidance will be provided as needed to assist in improving the staff member's performance.

The evaluation cycle consists of both data gathering and summative components. Performance will be monitored and an overall assessment will be provided. The cycle (Figure 1) includes an orientation conference, planning conference, data gathering, feedback conference, self-evaluation, a summative report/conference, and a growth plan. Each component is defined as follows:

I. Orientation Conference

- A. This conference will be held only the first year of employment.
- B. It will be held within the first week of employment.

II. Planning Conference

- A. This conference will focus on finalizing growth plans and setting goals for the year.
- B. For continuing employees it will be held within 30 working days of the summative conference.
- C. For new employees it will happen during the first month of their employment.

III. Data Gathering

- A. Input from peers, students, community, parents, building principals, and the employee will be used.
- B. Observations will be conducted at the work site.
- C. Whenever possible, representative work samples will be used.
- D. All supporting data materials that are personal communications do not require a signature but others, which are shown to the classified staff member, need a signature and a date.

IV. Feedback Conference

- A. Whenever a work site observation has been made, a conference will be held.
- B. It will be held in a timely manner.

V. Self-Evaluation

- A. This will be on-going and focus on the performance criteria in the evaluation system for classified staff.
- B. This information will be shared with the evaluator.

APPENDIX I. EVALUATION TIMELINE

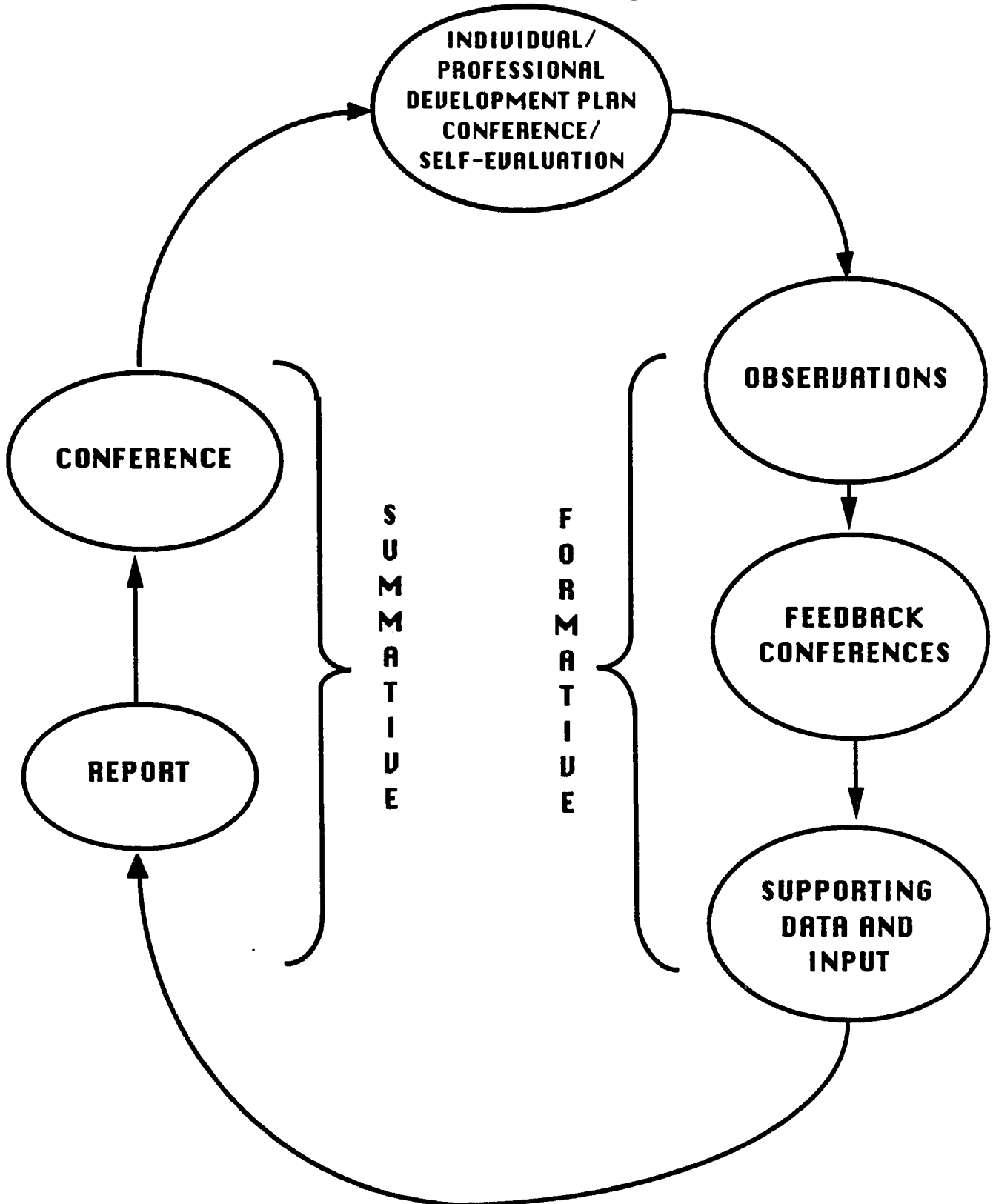
**WESTERN HILLS AREA EDUCATION AGENCY
PERFORMANCE EVALUATION TIMELINE**

<u>ACTIVITY</u>	<u>TARGET DATE</u>
Self-Evaluation (returning employees)	Prior to October 1
Self-Evaluation (new employees)	First two weeks of employment
Formal Observations	Minimum of 1-3
Feedback Conferences	Within one week following each observation
Informal Observations	As needed
Feedback Conferences	As needed
Supporting Data and Input	All three years
Summative Evaluation Report (SER)	By the last contract day
Summative Conference	By the last contract day
Mini Cycle	During the non-SER years
• Monitor Professional Development Plan	During the non-SER years
• Monitor accomplishment of Agency goals	During the non-SER years

APPENDIX J. EVALUATION CYCLE

PERFORMANCE EVALUATION CYCLE

Western Hills AEA, Sioux City, Iowa



Classified Staff Performance Evaluation Cycle

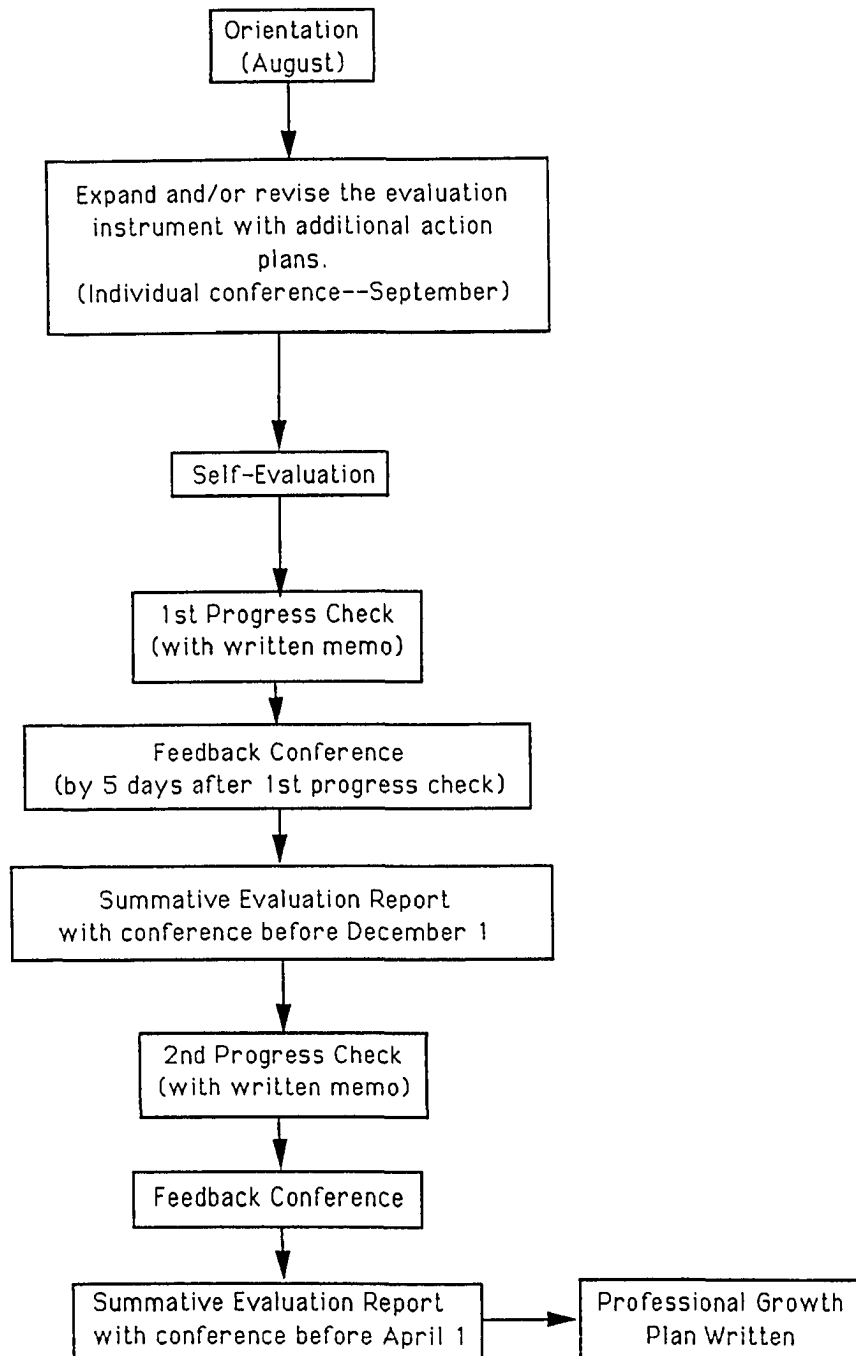
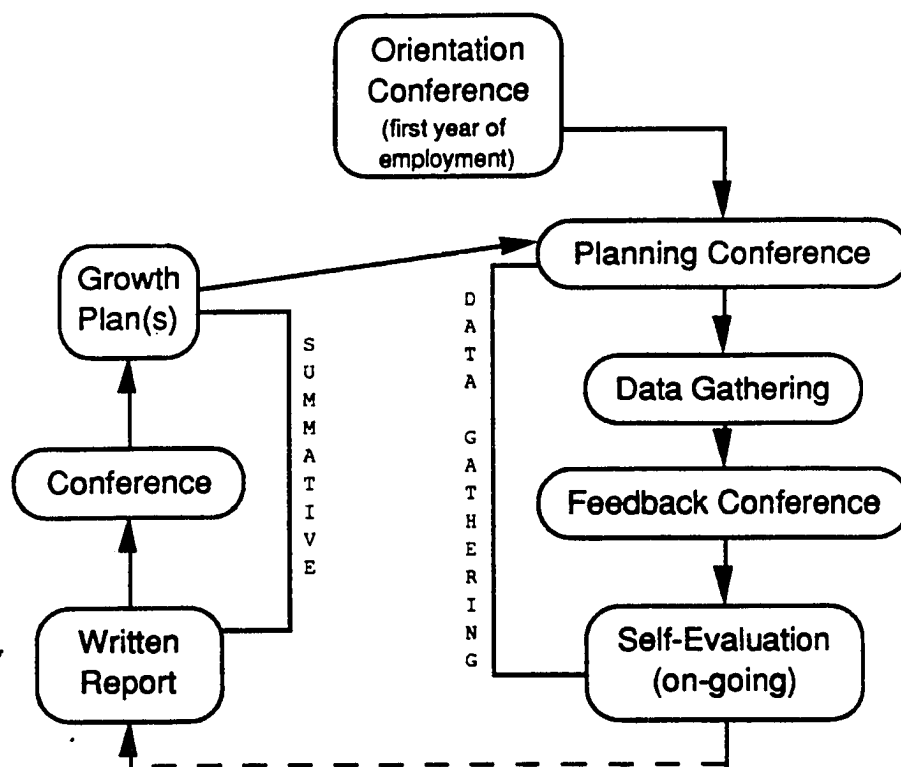


Figure 1. Evaluation Cycle



VI. The Summative Components

A. Written Report

1. This report will show the rating of each criterion.
2. It will be completed by May 15.
3. The completed report will be placed in the staff member's personnel file in the District Office.

B. Conference

1. This is to be held prior to May 15.
2. During this conference, the supervisor/evaluator discusses the ratings on the summative report.

C. Growth Plan

1. This will be developed cooperatively by the staff member and his/her supervisor/evaluator as an outgrowth of the summative conference.
2. One plan will be written each cycle.

APPENDIX K. GENERIC CRITERIA

GENERIC CRITICAL WORK ACTIVITIES FOR SECRETARIES

I. Job Specific Responsibilities

- A. Establishes and implements goals.
 - 1. Maintains system for receiving appropriate input.
 - 2. Identifies and prioritizes needs.
 - 3. Supports recommendations with documentation.
 - 4. Elicits staff, student, parent, and community commitment to goals.
 - 5. Develops strategies to accomplish goals.
 - 6. Monitors progress toward goal attainment and makes changes to improve problem areas.

- B. Acts in accordance with master contract, district policies/procedures, and state/federal regulations.
 - 1. Follows district policies/procedures and state/federal regulations.
 - 2. Informs the staff of policies/procedures and regulations.
 - 3. Promotes staff conformance to policies/procedures and regulations.
 - 4. Monitors staff conformance and takes appropriate action, when necessary.

- C. Provides orderly environment.
 - 1. Schedules space for effective utilization.
 - 2. Assures availability of supplies.
 - 3. Encourages, models, and maintains high standards of conduct.
 - 4. Establishes procedures for security of facilities and safety of personnel.
 - 5. Plans effective schedules.
 - 6. Prepares daily announcement sheet.
 - 7. Notifies principal of discipline problems and emergency maintenance situations.

- D. Is effective at recordkeeping and making reports.
 - 1. Submits reports on time.
 - 2. Provides systems for maintaining accurate records.
 - 3. Submits well-documented reports.
 - 4. Prepares student report cards.
 - 5. Prepares forms for enrollment/withdrawal of students.
 - 6. Prepares and maintains class lists.

- E. Demonstrates accuracy in doing tasks.
 - 1. Completes work on time.
 - 2. Relays messages promptly and accurately.
 - 3. Organizes the work tasks.
 - 4. Operates standard office equipment.

- F. Works well with administration, staff, students, and the community.
 - 1. Meets public effectively.
 - 2. Demonstrates good communication skills.
 - 3. Supervises student aides.
 - 4. Is flexible.
 - 5. Directs inquiries to the proper place.
 - 6. Coordinates appointments between parents and teachers and/or principal.
 - 7. Handles assigned duties effectively.
 - 8. Monitors procedures to check in/check out substitute teachers.
 - 9. Communicates with Director of Transportation regarding changes in transportation arrangements, arranging field trips, etc.

- G. Maintains clerical duties.
 - 1. Files correspondence and documents.
 - 2. Types letters, memos, reports, forms, school newsletters, school activity calendar, and bulletins.
 - 3. Processes time records.
 - 4. Tabulates daily attendance.
 - 5. Processes personnel documents.
 - 6. Distributes mail and internal correspondence.

- H. Maintains confidentiality.
 - 1. Disseminates sensitive material to appropriate staff only.
 - 2. Keeps sensitive material secure.

- I. Assists students.
 - 1. Distributes locks and activity cards to students.
 - 2. Registers new students.
 - 3. Issues admit slips to students.
 - 4. Sells lunch tickets to students.
 - 5. Attends to student needs when nurse is absent.

APPENDIX L. SAMPLE INSTRUMENTS BY DISTRICT

Western Hills Area Education Agency**PERFORMANCE AREAS, CRITERIA, AND DESCRIPTORS****Educational Services****(SECRETARY)****I. Generic Criteria**

The generic criteria (lettered items A-G) are the same for all Western Hills employees. The indicators (numbered items) serve merely as examples of behavior that would demonstrate the criteria. These will vary depending on the person's position.

A. Provides leadership.

1. Sets goals and objectives.
2. Uses creative problem-solving.
3. Holds high expectations for self and others.
4. Initiates new ideas.
5. Provides motivation.
6. Assists others in enhancing or developing individual strengths.
7. Promotes a positive climate within the Agency, with clients and the public.
8. Articulates the vision of the Agency.
9. Promotes the belief that all students can and will learn.
10. Assists Agency clients and visitors.

B. Manages responsibilities.

1. Handles multiple tasks concurrently.
2. Administers and adheres to policies.
3. Practices effective time management.
4. Completes assigned duties accurately and in a timely manner.
5. Selects appropriate channels for resolving conflict, concerns and problems.
6. Plans an appropriate schedule.
7. Maintains records and submits reports.
8. Encourages, models, and maintains high standards of conduct.

C. Establishes systematic procedures for accomplishing goals and objectives.

1. Forecasts needs, conditions, and availability of resources.
2. Determines priorities.
3. Organizes and assigns resources.
4. Establishes timelines.
5. Arranges systematic details.
6. Implements established plans.

D. Promotes the programs of the Agency.

1. Implements public relations activities.
2. Works toward involving others.
3. Makes recommendations for new policies directed toward improvement.
4. Participates in the Agency's programs.
5. Supports the agency mission, strategic goals and programs.

E. Practices effective participatory management techniques.

1. Establishes and uses procedures for obtaining input from others.
2. Evaluates the effectiveness of the decision-making procedures.
3. Serves as a role model when interacting with others.
4. Promotes the team concept.
5. Attends appropriate meetings.
6. Helps the team solve problems and reach objectives.
7. Is consistently on time and well-prepared.
8. Reviews complexities of both sides of issues and encourages consideration of consequences.
9. Participates in formulating mission statements.

F. Demonstrates human relations skills.

1. Contributes to harmony and unity within the organization.
2. Gets along with others.
3. Provides a climate for open communication.
4. Adapts to and supports organizational change.
5. Demonstrates fairness and consistency in dealing with others.
6. Supports the rights of others to hold differing views and values.
7. Uses discretion in handling situations that require confidentiality.
8. Returns phone calls promptly.
9. Encourages and practices effective communication.
10. Uses effective listening skills.
11. Handles phone calls in a professional, courteous manner.

G. Engages in professional growth activities.

1. Participates in staff development.
2. Stays current with job-related trends.
3. Plans professional growth activities which are based on professional needs.

II. Job Specific Responsibilities (Secretary)

A. Performs clerical duties.

1. Greets and assists visitors courteously.
2. Demonstrates effective telephone skills.
3. Routes incoming correspondence and professional literature accurately.
4. Processes dictation as needed.
5. Composes and processes correspondence, forms and reports using the appropriate equipment.
6. Implements an effective filing system.
7. Maintains accurate personnel rosters and appointment logs.
8. Operates office equipment efficiently.
9. Develops and coordinates office procedures.
10. Assembles and disseminates publications.
11. Assists with organizing and conducting meetings and workshops.

B. Monitors and reports computer program execution.

1. Observes and determines computer system operations efficiency and accuracy.
2. Performs necessary procedures to back up and protect computer files.
3. Recommends and orders computer equipment and software.
4. Installs software and trains employees in its use.
5. Demonstrates knowledge of word processing, spreadsheets and data bases as appropriate.

C. Ensures confidentiality of office information.

1. Maintains confidentiality of student files and information concerning various programs.
2. Obtains authorization from supervisor for release of information concerning students.

D. Orders and maintains supplies, equipment and professional materials.

1. Processes necessary forms for purchasing.
2. Monitors purchasing records.
3. Maintains inventory.

E. Provides library services.

1. Maintains inventory of professional literature and coordinates filing system with supervisor.
2. Orders, receives, and circulates professional materials.

3. Orders materials based on requests from professional personnel.
4. Monitors circulation process to include CATE materials and circulation records.
5. Conducts computer search for materials using CD-ROM.
6. Orders, receives, and catalogs library materials.
7. Assists library patrons in finding material and determining availability.

CRITERIA AND DESCRIPTORS**SECRETARY**Professional Responsibilities

1. Demonstrates effective interpersonal relationship skills.
 - a. Adapts to and supports organizational change.
 - b. Demonstrates fairness and consistency in dealing with others.
 - c. Uses discretion in handling situations that require confidentiality.
 - d. Encourages and practices effective communication with others.
 - e. Promotes a positive climate within the organization.
2. Demonstrates effective communication skills.
 - a. Uses written communication appropriately and professionally.
 - b. Communicates decisions in a timely manner.
 - c. Returns phone calls promptly.
 - d. Gives clear, explicit explanation.
3. Demonstrates employee responsibility.
 - a. Is consistently on time and well-prepared.
 - b. Responds appropriately to parental concerns.
 - c. Provides accurate data to the school and district as requested.
 - d. Completes duties accurately and promptly.
 - e. Adheres to authorized policies and school regulations.
 - f. Selects appropriate channels for resolving concerns/problems.
 - g. Strives to stay informed regarding policies and regulations applicable to his/her position.
 - h. Encourages, models, and maintains high standards of conduct.
 - i. Attends appropriate meetings.
 - j. Serves on committees.
 - k. Promotes the belief that all students can and will learn.
4. Manages critical work activities.
 - a. Keeps informed about appropriate job-related programs.
 - b. Handles multiple tasks concurrently.
 - c. Maintains an appropriate and flexible schedule.
 - d. Establishes priorities.
 - e. Maintains records and submits reports.
5. Establishes systematic procedures for identifying and accomplishing goals and objectives.
 - a. Forecasts needs, conditions, and availability of resources.
 - b. Determines priorities.
 - c. Develops goals and objectives.
 - d. Establishes timelines.
 - e. Organizes and assigns resources.

- f. Implements established plans.
6. Provides leadership.
- a. Demonstrates high expectations for self and others.
 - b. Initiates new ideas.
 - c. Provides motivation.
 - d. Assists others in enhancing or developing individual strengths.
 - e. Promotes a positive climate within the organization.
 - f. Promotes the belief that all students can and will learn.
 - g. Participates in staff development.
 - h. Stays current with job-related trends.
 - i. Joins professional associations.
 - j. Studies professional journals and literature.
 - k. Implements public relations activities.
 - l. Participates in the development and review of school policies and regulations.
 - m. Participates in the organization's programs.

Secretary-Specific Responsibilities

7. Maintains student records.
- a. Processes changes in student schedules.
 - b. Records pertinent information on student permanent record cards.
 - c. Records grades.
 - d. Keeps attendance records.
 - e. Maintains required reports on students.
 - f. Enrolls students.
8. Performs clerical tasks.
- a. Processes purchase orders and work orders.
 - b. Processes written communication.
 - c. Receives and routes incoming telephone calls.
 - d. Operates copy machine.
 - e. Processes mail.
 - f. Transcribes and disseminates minutes.
 - g. Types reports.
9. Maintains accurate accounting records.
- a. Maintains activity account.
 - b. Maintains school lunch program account.
 - c. Maintains federal funds program account.
 - d. Makes deposits.

10. Assists staff.
 - a. Provides computer support.
 - b. Prepares instructional materials.
 - c. Assists with lunchroom monitoring.
 - d. Serves as nurse when needed.

Project Action Plan

11. Successfully accomplishes the Project Action Plan.

BASEHOR-LINWOOD, KANSAS #458
CRITERIA AND DESCRIPTORS
(District Office Secretary)

Professional Responsibilities

1. Demonstrates effective interpersonal relationship skills.
 - a. Adapts to and supports organizational change.
 - b. Demonstrates fairness and consistency in dealing with others.
 - c. Uses discretion in handling situations that require confidentiality.
 - d. Is sensitive to the needs and feelings of others.
 - e. Promotes a positive climate within the organization and community.
2. Demonstrates effective communication skills.
 - a. Communicates in a professional manner.
 - b. Communicates decisions in a timely manner.
 - c. Gives clear, explicit explanation.
3. Demonstrates employee responsibility.
 - a. Is consistently on time and well prepared.
 - b. Responds appropriately to others' concerns.
 - c. Provides accurate data to the school and district as requested.
 - d. Completes duties accurately, promptly, and with quality.
 - e. Adheres to authorized policies and school regulations.
 - f. Selects appropriate channels for resolving concerns/problems.
 - g. Strives to stay informed regarding policies and regulations applicable to his/her position.
 - h. Encourages, models, and maintains high standards of conduct.
 - i. Attends appropriate meetings.
 - j. Is willing to serve on committees.
 - k. Promotes the belief that all students can and will learn.
 - l. Handles information about school problems and students in a professional/confidential manner.
4. Manages critical work activities.
 - a. Keeps current on changes or innovations in job-related programs.
 - b. Handles several tasks at once.
 - c. Maintains an appropriate and flexible schedule.
 - d. Establishes priorities.
 - e. Maintains records and submits reports.

5. Establishes systematic procedures for identifying and accomplishing goals.
 - a. Projects needs, conditions, and availability of resources.
 - b. Determines priorities.
 - c. Develops goals and objectives.
 - d. Establishes timelines.
 - e. Organizes and assigns resources.
 - f. Implements established plans.

6. Provides leadership.
 - a. Demonstrates high expectations for self and others.
 - b. Initiates or is willing to accept and try new ideas.
 - c. Motivates self and others.
 - d. Assists others in enhancing or developing individual strengths.
 - e. Promotes a positive climate within the organization.
 - f. Promotes the belief that all students can and will learn.
 - g. Participates in staff development.
 - h. Stays current with job-related trends.
 - i. Joins professional associations, if appropriate.
 - j. Studies professional journals and literature, if appropriate.
 - k. Promotes positive public relations.
 - l. Participates in the development and review of school policies and regulations.
 - m. Participates in the district's programs.

Job-Specific Responsibilities

7. Assists maintenance functions.
 - a. Monitors heat in building.
 - b. Schedules substitute custodians.

8. Performs clerical tasks.
 - a. Answers the phone.
 - b. Types documents using typewriter and computer.
 - c. Processes dictation as needed.
 - d. Records minutes at board meetings.
 - e. Operates office equipment.
 - f. Reports mileage, business transaction, vacation, and sick leave accurately.
 - g. Processes, separates, and distributes mail.
 - h. Serves as superintendent's confidential secretary.

9. Provides for the arrangement of facilities for meetings.
 - a. Provides catering arrangements.
 - b. Supervises room arrangements.
 - c. Makes preparations for school board meetings.

10. Develops and implements Division system.

- a. Oversees staff certification requirements.
- b. Receives, sends, and manages employee applications.
- c. Keeps records on students.
- d. Assigns filing tasks appropriately.
- e. Types and files administrator performance evaluations.
- f. Organizes and maintains office professional library.
- g. Collects appropriate information and maintains accurate personnel rosters, office directory, and appointment logs.

APPENDIX M. SAMPLE TIMELOGGING ANALYSIS

WESTERN HILLS AREA EDUCATION AGENCY

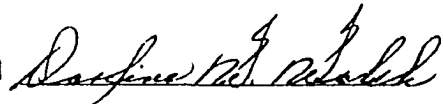
CRITICAL WORK ACTIVITY MONITORING: FEBRUARY 1 THROUGH FEBRUARY 28, 1991

POSITION: SERVICE CENTER SECRETARY

RANK ORDERED BY PERCENT OF TOTAL TIME. 16 OF 20 DAYS, 128 OF 160 HOURS

CRITICAL WORK ACTIVITY	TIME DEVOTED TO ACTIVITY			Days	Percent	Rank	Days	Hours
	Rank	Hours	Percent					
PERFORMS WORD PROCESSING	1	41.91	32.74%	16	100.00%	1		
WORKS ON DATA BASE SYSTEM	2	21.66	16.92%	15	93.75%	4		
OPERATES TELEPHONE	3	13.83	10.80%	16	100.00%	1		
PERFORMS CLERICAL DUTIES	4	10.50	8.20%	16	100.00%	1		
MAINTAINS RECORDS	5	6.83	5.34%	15	93.75%	4		
PHOTOCOPIES	6	4.08	3.19%	13	81.25%	6		
SCHEDULES WORKDAY ACTIVITIES	7	3.58	2.80%	13	81.25%	6	15	3.50
PERFORMS OFFICE MAINTENANCE	8	0.83	0.65%	4	25.00%	8		
PARTICIPATES IN PROFESSIONAL GROWTH	9	0.00	0.00%	0	0.00%	9		
		103.22	80.64%					3.50

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DARLINE WALSH 

Emrie Ann Miller

DRAFT

FREMONT COUNTY SCHOOL DISTRICT #2
 CRITICAL WORK ACTIVITY MONITORING: January 18-February 5, 1993
 RANK ORDERED BY PERCENT OF TOTAL TIME
 POSITION: Secretary to Superintendent
 16 of 20 days, 109 of 150 hours (7.5 hours/day)

CRITICAL WORK ACTIVITY	TIME DEVOTED TO ACTIVITY			ACTUAL NUMBER OF WORK DAYS IMPLEMENTING THE CWA			AFTER HOURS TIME DEVOTED TO CWA	
	Rank	Hours	%	Number	%	Rank	Days	Hours
Superintendent correspondence	1	24.00	22.02	15	93.75	1		
Central office: mail, work orders, vouchers	2	22.00	20.18	13	81.25	5		
School board meetings/minutes/etc.	3	16.25	14.91	14	87.50	4	2	4.00
Student related correspondence	4	16.00	14.68	15	93.75	1		
Counting, receipting, depositing money	5	13.12	12.04	16	100.00	1		
Faculty correspondence	6	5.08	4.66	7	43.75	6		
Joint powers board	7	5.00	4.59	7	43.75	6		
Special revenue account work	8	3.75	3.44	5	31.25	8		
Faculty meeting and minutes	9	3.25	2.98	3	18.75	9	1	1.00
TOTAL		108.45	99.50					5.00

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Approved by Emrie Ann Miller Emrie Ann Miller

Basehor-Linwood School District
Critical Work Activity Monitoring Dec. 13-Dec. 19, 1993; Jan. 3-Jan. 23, 1994
Rank Ordered by Percent of Total Time

Name: Sue Luttrell
Position: Secretary/Purchasing Ac
Building: Linwood Elementary

Days Worked: 19
Days in Study: 20
Minutes Monitored: 9,560
Minutes in Study: 9,120

CRITICAL WORK ACTIVITY	TIME DEVOTED TO ACTIVITY			ACTUAL NUMBER OF WORK DAYS IMPLEMENTING THE CWA			AFTER HOURS TIME DEVOTED TO CWA	
	Rank	Minutes	%	Rank	Number	%	DAYS	MINUTES
Process purchase orders	1	3,000	31.38%	3	13	68.42%		
Generate reports	2	1,530	16.00%	4	8	42.11%		
Verify and pay invoices	3	1,110	11.61%	5	7	36.84%		
Process coop. orders	4	690	7.22%	7	6	31.58%		
Facilitate phone calls	5	630	6.59%	1	19	100.00%		
Professional growth	6	600	6.28%	10	2	10.53%		
Print checks	6	600	6.28%	8	5	26.32%		
Maintain petty cash	8	470	4.92%	8	5	26.32%		
Distribute mail	9	270	2.82%	2	17	89.47%		
Write bid specifications	10	180	1.88%	10	2	10.53%		
Coordinate arrangements/workshops	10	180	1.88%	12	1	5.26%		
Facilitate needs of supervisors	12	150	1.57%	5	7	36.84%	1	150
Update software	12	150	1.57%	12	1	5.26%		
Proof newsletter								
Coordinate insurance claims								
TOTAL:		9,560	104.82% OF POSSIBLE TIME					150

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Approved by _____
 Sue Luttrell

Lincoln County School District #1
 Critical Work Activity Monitoring
 Rank Ordered by Percent of Total Time

February 22-March 20, 1994

Name: Mary Beth Ferrarini
 Position: Accounts Payable Clerk
 Building: Administration

Days Worked: 17
 Days in Study: 19
 Minutes Monitored: 7,505
 Minutes in Study: 9,120

CRITICAL WORK ACTIVITY	TIME DEVOTED TO ACTIVITY			ACTUAL NUMBER OF WORK DAYS IMPLEMENTING THE CWA			AFTER HOURS TIME DEVOTED TO CWA	
	Rank	Minutes	%	Rank	Number	%	DAYS	MINUTES
Processing and paying invoices	1	3,065	40.84%	1	16	94.12%	2	120
Reconciling/preparing month end reports	2	1,510	20.12%	4	14	82.35%		
Filing	3	1,150	15.32%	1	16	94.12%		
Checking in freight	4	690	9.19%	4	14	82.35%		
Researching invoices	5	590	7.86%	6	12	70.59%		
Sorting and distributing mail	6	500	6.66%	1	16	94.12%		

TOTAL: 7,505 82.29% OF POSSIBLE TIME 120

Approved by Mary Beth Ferrarini
 Mary Beth Ferrarini

APPENDIX N. SAMPLE SUMMATIVE EVALUATION FORM

FREMONT COUNTY SCHOOL DISTRICT #2
SUMMATIVE EVALUATION REPORT
SECRETARY

Evaluatee's Name	Title	Building	
Person Completing Report: _____ Evaluatee (Self-Evaluation) _____ Evaluator			
Evaluatee's Signature	Date	Evaluator's Signature	Date

DIRECTIONS: Place a check in the column that best describes the evaluatee's performance on that criterion. Each criterion must be completed.

- DEFINITIONS:**
- ***Does Not Meet Level of Competency:*** Evidence shows that quality and/or consistency of performance does not meet district criterion.
 - ***Some Improvement Needed:*** Evidence shows that quality and/or consistency could be improved as the criterion is applied.
 - ***Competent:*** Evidence shows that both quality and consistency have been demonstrated as the criterion is applied.
 - ***Exceeds Competence:*** Evidence shows that outstanding performance has been demonstrated. This person could model this criterion for others.

SUMMATIVE EVALUATION REPORT

SECRETARY

 FREMONT COUNTY SCHOOL DISTRICT #2
 DUBOIS, WYOMING

PROFESSIONAL RESPONSIBILITIES

1. Demonstrates effective interpersonal relationships.
*Does Not Meet
Level of
Competency*

*Some
Improvement
Needed*

Competent

*Exceeds
Competence*

COMMENTS:

2. Demonstrates effective communication skills.
*Does Not Meet
Level of
Competency*

*Some
Improvement
Needed*

Competent

*Exceeds
Competence*

COMMENTS:

3. Demonstrates employee responsibilities.
*Does Not Meet
Level of
Competency*

*Some
Improvement
Needed*

Competent

*Exceeds
Competence*

COMMENTS:

PROFESSIONAL RESPONSIBILITIES (continued)

4. Manages responsibilities.*Does Not Meet
Level of
Competency**Some
Improvement
Needed**Competent**Exceeds
Competence*

COMMENTS:

5. Establishes systematic procedures for establishing and accomplishing goals and objectives.*Does Not Meet
Level of
Competency**Some
Improvement
Needed**Competent**Exceeds
Competence*

COMMENTS:

6. Provides leadership.*Does Not Meet
Level of
Competency**Some
Improvement
Needed**Competent**Exceeds
Competence*

COMMENTS:

SECRETARY-SPECIFIC RESPONSIBILITIES

7. Maintains student records.

*Does Not Meet
Level of
Competency*

*Some
Improvement
Needed*

Competent

*Exceeds
Competence*

COMMENTS:

8. Performs clerical tasks.

*Does Not Meet
Level of
Competency*

*Some
Improvement
Needed*

Competent

*Exceeds
Competence*

COMMENTS:

9. Maintains accurate accounting records.

*Does Not Meet
Level of
Competency*

*Some
Improvement
Needed*

Competent

*Exceeds
Competence*

COMMENTS:

SECRETARY-SPECIFIC RESPONSIBILITIES (continued)

10. Assists staff.

*Does Not Meet
Level of
Competency*

*Some
Improvement
Needed*

Competent

*Exceeds
Competence*

COMMENTS:

PROJECT ACTION PLAN

11. Successfully accomplishes the Project Action Plan.

Yes _____

Completion Date ____ / ____ / ____

No _____

COMMENTS:

PROJECT ACTION PLAN

Person Responsible _____

GOAL STATEMENT: _____

(Write a separate plan
for each project)

<i>STRATEGIES</i>	<i>TIME FRAME</i>	<i>PROJECT COORD</i>	<i>TEAM MEMBERS</i>	<i>EST. COST</i>	<i>EVALUATION</i>

Progress Meeting Completion Date: _____ Signature of Evaluator: _____

Fully Accomplished: _____ Partially Accomplished: _____ Not Accomplished: _____

CLASSIFIED STAFF PROFESSIONAL GROWTH PLAN

Name _____ Title _____

Building _____ Date _____

<p>Performance Area: (check one)</p> <p>_____ Professional Responsibilities</p> <p>_____ Position-Specific Responsibilities</p> <p>_____ Project Action Plan</p>	<p><i>Select lowest-rated criterion.</i></p>
---	--

I. GOAL (general intent)

II. SPECIFIC MEASURABLE BEHAVIOR (What will be done?)

<p>III. PROCEDURES (How will it be done?)</p> <p>1.</p> <p>2.</p> <p>3.</p> <p>4.</p> <p>5.</p>	<p>Timeline</p>
--	-----------------

IV. PROGRESS CHECK (How is it going?)

Evaluator Comments:

V. DOCUMENTATION/APPRaisal METHOD FOR FINAL ACCOMPLISHMENT
 (How will you know it has been accomplished?)

Evidence:

Standard:

Appraisal Method: The evidence will be compared with the standard to determine the level of accomplishment.

 Evaluator's Signature

 Date

 Evaluatee's Signature

 Date

EVALUATOR COMMENTS:

EVALUATEE COMMENTS:

 Evaluator's Signature

 Date

 Evaluatee's Signature

 Date

GLOSSARY

Administrative Action Plan — A form used to outline the responsibilities of an administrator (or team of administrators) in accomplishing an objective of the district's strategic plan.

Announced Observation — An announced observation is a minimum of 30 consecutive minutes, results in a written observation record, and must be followed by a post-observation conference. Additionally, an announced observation sequence may include a series of visitations during a period of five working days.

Assessment — Processes that are focused on quantitative and/or testing approaches and less on judgment.

Culture — Shared philosophies, values, beliefs and assumption, and norms of behavior that are seldom written down as decisions but are learned by living and working in the organization. Culture is a unifying theme that provides meaning, direction, and a source of mobilization.

Cycle of Administration — Administrative performance includes the following functions in a sequential cycle: planning, delivery, appraisal and interpretation.

Due Process — Constitutional protection guaranteed a public employee for proper procedure and fair treatment. In the case of performance evaluation it includes notice, explanation, assistance, and time.

Equity — Increase in quality does not vary percentage-wise by gender, race, and socioeconomic status of students.

Evaluation — The process of determining the merit, worth or value of something, appropriately based on measures and a synthesis of other valid evidence.

Excellence — Ever increasing quality of programs and products.

Formative Evaluation — On-going observations, both announced and unannounced, as well as the performance feedback and coaching which are conducted with the staff member by the evaluator during the evaluation cycle. A professional growth plan and work toward its completion are included in this part of the cycle.

Formative Evaluation of Student Performance — Refers to progress testing and/or nontraditional assessment throughout the course of program. Allows for instructional changes to enhance learning.

Performance Criteria — These serve to describe observable behaviors which, when performed, indicate fulfillment of the attendant responsibility.

Postobservation Conference — This conference is held following an announced observation for the purposes of discussing the observation and other factors relevant to the staff member's performance of responsibilities as listed in the position description.

Preobservation Conference — A meeting of the teacher and the evaluator to discuss the preobservation form and to discuss the lesson plan.

Preobservation Form — Form completed by teacher and given to evaluator at least one day prior to an announced classroom observation. See *Teacher and Support Staff Performance Evaluation Handbook*.

Process Learning — Strategies for “knowing.” The processes necessary to learn content. These elements are life skills used to relate formal education to the outside world.

Professional Growth Plan — A plan with objectives and methods for achieving them, designed to stimulate on-going professional growth for a staff member whose performance meets district standards.

Project Action Plan — A form used to outline the responsibilities of a certified or classified employee (or group of employees) in accomplishing an objective of the district's strategic plan.

Retention — The decision to continue the employment of a probationary teacher. In Wyoming, the decision is made annually for three years. A teacher continuously employed in another Wyoming district may be granted tenure after two years.

School Unit — Organizational subdivisions of a school district; for example, elementary, middle school, and high school.

Self-Evaluation — Each year the teacher completes a copy of the Summative Evaluation Report as a self-evaluation. Sharing this information with the evaluator is optional. This is done in September.

Shared Decision Making — An arrangement for participatory management whereby all of the stakeholders share in the problem solving and decision-making of a district with accountability commensurate with involvement.

Stakeholders — All in the district who have a stake in quality education: students, parents, teachers, administrators, the board, and community members.

Student Feedback — Student feedback to teachers is obtained from a survey of students in each course offered at times set by each unit faculty. Specialized instruments are used for primary grades (K-2), upper elementary, middle school, and high school.

Summative Evaluation — This term refers to the final evaluation which is completed annually for tenured teachers and twice yearly for probationary teachers. The summative evaluation is based on data collected during the formative part of the evaluation cycle.

Summative Evaluation of Student Performance — End-of-the-course or end-of-the-program testing and/or nontraditional assessment.

Unannounced Observation — This casual, day-to-day observation can be of any length; its purposes are to validate and support effective instruction and to monitor overall performance.

**Summative Evaluation Report
District Office Secretary**

Evaluatee's Name	Building	Date
Evaluator's Name	Date	Evaluatee's Signature
		Date

(The evaluatee's signature indicates this report has been reviewed and discussed.)

DIRECTIONS: Place a check in the column that best describes the evaluatee's performance on that criterion. When *Exceeds "Professionally Competent," Needs Improvement,* or *Unsatisfactory* are given, comments must be written to support the rating.

- DEFINITIONS:**
- *Exceeds "Professionally Competent"*
Evidence shows that outstanding performance is clearly obvious. This person could model this criterion for others.
 - *Professionally Competent*
Evidence shows that both quality and consistency are apparent as the criterion is applied.
 - *Needs Improvement*
Evidence shows that quality and/or consistency could be improved as the criterion is applied.
 - *Unsatisfactory*
Evidence shows that quality and/or consistency of performance does not meet district criterion.

PROFESSIONAL RESPONSIBILITIES

<i>Criteria</i>	<i>Levels of Performance</i>			
	Exceeds "Professionally Competent"	Professionally Competent	Needs Improvement	Unsatisfactory
1. Demonstrates effective inter- personal relationship skills.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Evaluator Comments:	Evaluatee Comments:			
2. Demonstrates effective communication skills.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Evaluator Comments:	Evaluatee Comments:			
3. Demonstrates employee responsibility.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Evaluator Comments:	Evaluatee Comments:			

PROFESSIONAL RESPONSIBILITIES (continued)

Criteria	Levels of Performance			
	Exceeds "Professionally Competent"	Professionally Competent	Needs Improvement	Unsatisfactory
4. Manages critical work activities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Evaluator Comments:	Evaluatee Comments:			
5. Establishes systematic procedures for identifying and accomplishing goals and obj.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Evaluator Comments:	Evaluatee Comments:			
6. Provides leadership.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Evaluator Comments:	Evaluatee Comments:			

JOB-SPECIFIC RESPONSIBILITIES

<i>Criteria</i>	<i>Levels of Performance</i>			
	Exceeds "Professionally Competent"	Professionally Competent	Needs Improvement	Unsatisfactory
7. Assists maintenance functions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Evaluator Comments:	Evaluatee Comments:			
8. Performs clerical tasks.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Evaluator Comments:	Evaluatee Comments:			
9. Provides for the arrangement of facilities for meetings.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Evaluator Comments:	Evaluatee Comments:			

JOB-SPECIFIC RESPONSIBILITIES *(continued)*

<i>Criteria</i>	<i>Levels of Performance</i>			
	Exceeds "Professionally Competent"	Professionally Competent	Needs Improvement	Unsatisfactory
10. Develops and implements Division system.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Evaluator Comments:	Evaluatee Comments:			

GROWTH PLAN

Name _____ Title _____
 Building _____ Date _____

Performance Area: (check one)

_____ Professional Responsibilities

_____ Job-Specific Responsibilities

Select lowest-rated criterion.

I. GOAL (general intent)

II. SPECIFIC MEASURABLE BEHAVIOR (What will be done?)

III. PROCEDURES
(How will it be done?)

- 1.
- 2.
- 3.
- 4.
- 5.

Timeline

IV. PROGRESS CHECK (How is it going?)

Evaluator Comments:

**V. DOCUMENTATION/APPRAISAL METHOD FOR FINAL ACCOMPLISHMENT
(How will you know it has been accomplished?)**

Evidence:

Standard:

Appraisal Method: The evidence will be compared with the standard to determine the level of accomplishment.

 Evaluator's Signature Date Evaluator's Signature Date

EVALUATOR COMMENTS:

EVALUATEE COMMENTS:

 Evaluator's Signature Date Evaluator's Signature Date

Glossary

Administrative Observations - Work site visits to observe administrator performance. These may be slice-of-time observations (such as observing a staff meeting, child study team meeting, a feedback conference with a teacher, etc.) or shadowing, which is spending a longer block of time to observe at the work site.

Assessment - Processes that are focused on quantitative and/or testing approaches and less on judgment.

Authentic Assessment - Sometimes called *non-traditional assessment*, it is an act or procedure that is nearer to measuring the real ability and achievement of a student than traditional, especially multiple-choice tests. Examples might be products, portfolios, performances, and personal communication.

Consideration Folder - A file of supporting data. The examples may include, but not be limited to, work samples (teacher artifacts), students' work, student feedback, lesson assessments, growth plans, etc.

Continuing Contract Cycle - (to be proposed at the completion of the pilot test)

Continuing Contract Teacher - Any initial contract teacher who has been employed by the same school district in the state of Wyoming for a period of three consecutive school years, and has had his contract renewed for a fourth consecutive school year OR a teacher who has achieved continuing contract status in one district and who without lapse of time has taught two consecutive school years and has had his contract renewed for a third consecutive school year by the employing school district.

Data - Observations, work samples, input from peers, students, community, parents, and evaluators.

Due Process - Constitutional protection guaranteed a public employee for proper procedure and fair treatment. In the case of performance evaluation it includes notice, explanation, assistance, and time.

Equity - Increase in quality does not vary percentage-wise by gender, race, and socioeconomic status of students.

Ethical behavior - Behavior that displays an irreversible commitment to treat the welfare of others as comparable to one's own. *Ethical behavior* includes obligations to scientific practice, prudence, family, culture and nation.

Evaluation - The process of determining the merit, worth or value of something, appropriately based on measures and synthesis of other valid evidence.

Excellence - Ever increasing quality of programs and products.

Formal Observations - Announced visits as a part of the clinical supervision cycle.

Growth Plan - A plan with objectives and methods for achieving them, designed to stimulate on-going professional growth for a staff member.

Informal Observation - This casual, day-to-day observation can be of any length; its purposes are to validate and support effective performance and to monitor overall performance.

- Initial Contract Cycle** - (to be proposed at the completion of the pilot test)
- Initial Contract Teacher** - Any teacher who has not achieved continuing contract status.
- Intensive Assistance** - The process used when an employee has not met the performance standards the previous year. That employee is provided with assistance the following year. (*Operational definition--stakeholders will create a more comprehensive definition next year.*)
- Management Action Plan** - a form used to outline the responsibilities of an administrator (or team of administrators) in accomplishing an objective of the District's strategic plan.
- Mentor** - An experienced teacher selected to coach beginning teachers.
- Peer Coaching/observation** - A teaming of peers to provide feedback.
- Performance Criteria** - These serve to describe observable behaviors which, when performed, indicate fulfillment of the attendant responsibility.
- Postobservation Conference** - This conference is held following an announced observation for the purposes of discussing the observation and other factors relevant to the staff member's performance of responsibilities as listed in the position description.
- Project Action Plan** - A form used to outline the responsibilities of a certified or classified employee (or group of employees) in accomplishing an objective of the district's strategic plan.
- Self-Evaluation** - Self-rating by an employee using the summative evaluation report form.
- Social responsibilities** - Behaviors that reflect the values, beliefs and norms of behavior in a culture. Examples for the US. would be tolerance, respect for others and honesty.
- Stakeholders** - All persons in the District who have a stake in quality education: students, parents, teachers, staff members, administrators, the board, and community members.
- Student/Parent Surveys** - Feedback instruments to determine client satisfaction.
- Summative Evaluation** - This term refers to the final evaluation which is completed at the end of the evaluation cycle. The summative evaluation is based on data collected during the formative part of the evaluation cycle.
- Videotaping** - Teacher-made tapes of teaching and learning activities which are made to improve the teaching/learning situation.