

## Account Clerk

### Domain 1: Planning and Preparation

#### Element:

Task Completion

#### Unsatisfactory

Inefficient and undependable in task completion.

#### Satisfactory

Usually completes work according to timelines/directives.

#### Proficient

Completes work efficiently and accurately according to timeline/directives provided.

#### Distinguished

Exceptionally dependable and conscientious in all tasks assigned; finds value-added tasks to do without being assigned.

Task Transitions

Much time is lost transitioning from one task to another.

Task transitions are sometimes inefficient resulting in loss of productive time.

Transitions occur smoothly with little loss of productive time.

Excellent in transitioning from task to task without loss of focus. Able to plan in advance for transition.

Use of Resources

Frequent misuse or wasteful use of available resources.

Some knowledge of and proper use of appropriate resources.

Effectively utilizes available resources for task completion.

Creative and resourceful in using appropriate materials and resources.

Initiative in Planning

Needs direction in project planning. Unable to think through the steps of planning for a project or task.

Given project outline, determines the steps and plans for completion of project.

Effectively initiates plans, steps, and completes tasks with minimal direction.

Generates needs, initiates plans, executes steps in plan. Revises and evaluates plans as needed.

Task Priority

Is unable to prioritize tasks, or set daily agenda. Needs reminders to prioritize tasks.

Regularly prioritizes tasks and sets daily agenda.

Prioritizes tasks for short and long term goals. Determines needs daily and sets priorities for the future.

Efficiently prioritizes tasks for daily, weekly, and monthly responsibilities. Reviews priorities daily,

Organizational Planning

Does not foresee or plan for upcoming organizational needs.

Given a specified organizational need, identifies and completes tasks.

Independently identifies and carries out tasks to meet organizational needs.

Independently identifies and carries out tasks to meet organizational needs and systematizes the process.

### Domain 2: Environment

#### Component 1: Creating an Environment

**of Respect and Rapport**

**Element:**

Interaction With Students

\* May not apply to every position.

**Unsatisfactory**

Interactions with some students are negative, sarcastic, or inappropriate.

**Satisfactory**

Student interactions are generally appropriate but may reflect occasional inconsistencies or favoritism.

**Proficient**

Student interactions are friendly and demonstrate warmth and respect. Students respect this individual.

**Distinguished**

Consistently models respect and caring for all students; volunteers to work with students outside regular job.

Interaction With Staff

Does not demonstrate respect toward others, gossips and belittles others. Makes little attempt to establish harmonious relationships.

Interactions with other staff members are usually respectful but may have difficulty working with some individuals.

Interactions with staff are friendly; attempts to work through differences and is sensitive to the feelings of others.

Genuinely respects and understands others and deservedly earns the respect of fellow staff members. Recognizes that "staff" includes all others in district.

Interaction With Parents/Community

\* May not apply to every position

Interactions with parents and community are negative, tactless, and/or non-supportive of administrator or school district.

Interactions are generally respectful and appropriate but are limited to providing basic services.

Interactions demonstrate warmth and respect. Provides assistance for parents and community.

Interactions with parents and community convey respect. Is seen as a valuable resource for parents and community.

Interaction With Administrator/Supervisor

Does not demonstrate respect or support. Interactions are often negative. Views constructive feedback as negative.

Is generally respectful and supportive of supervisor/administrator. Accepts feedback and requests advice when in doubt.

Consistently demonstrates cooperative work and collegial respect. Seeks feedback from supervisor to learn and improve skills.

Consistently demonstrates thorough cooperation, support, and respect. Can constructively disagree. Has thorough trust and confidence of supervisor in their absence.

**Component 2: Organizing**

**Physical Space**

**Element:**

Work Area

Work area is generally disorganized and untidy.

Work area is clean.

Work area is organized and presentable.

Work area is exceptionally well-organized and aesthetically pleasing.

Equipment Operation

Does not understand how to operate standard

Operates office equipment safely

Sees potential problems and corrects ahead

Uses various office equipment to improve

office equipment properly.

and properly.

of time.

efficiency in task completion.

**Domain 3: Service Delivery**  
**Component 1: General Office Support**

**Element:**

Oral and Written Language

**Unsatisfactory**

Spoken and/or written language is inappropriate and may contain many grammar and syntax errors.

**Satisfactory**

Spoken and written language skills are adequate. Vocabulary and grammar are correct, but may be limited or inappropriate at times.

**Proficient**

Spoken and written language is clear and correct. Work products convey an appropriate professional image.

**Distinguished**

Spoken and written language is correct and expressive with well-chosen and appropriate vocabulary. Work products advance unit/district image.

Office Management

Is unable to manage routine office tasks without close supervision.

Performs routine office management tasks with some supervisory support.

Is able to manage all routine office management tasks efficiently with minimal supervision.

Demonstrates ability to plan and foresee office tasks. Works independently. Maintains a calm demeanor under pressure.

Telephone Skills

Does not answer phone promptly or continues office conversation when answering. Voice is quiet, bothered, or hesitant. Callers wait too long.

Telephone is answered promptly and pleasantly. Callers are quickly attended to or transferred appropriately.

Telephone is answered promptly and pleasantly. Calls are screened and information provided as appropriate.

Displays exceptional phone skills. Deft at diffusing difficult situations. Knows which calls to handle and how much information to share.

File Management

Is not aware of file updating and file management needs.

Is aware of file needs and consistently manages/updates files in a timely manner.

Plans for and updates files systematically.

Improves and streamlines file management efficiency.

Teacher/Staff Absences

\* May not apply to every position

Does not track or notify supervisor of absences. Does not attempt to resolve issue when no sub is available.

Is aware of absences in AESOP and generally tries to have accurate information in the system.

Manages all staff absences in AESOP/Skyward. Monitors changes, and ensures systems have correct information.

Checks daily report in AESOP. Modifies and creates absences as needed. Ensures times reflected in each system are correct for teachers/

staff.

Knowledge of Emergency Procedures

Has minimal knowledge of emergency procedures for building.

Has knowledge and provides information on emergency procedures with staff orally and in writing.

Coordinates emergency procedure practice drills. Reviews procedures regularly.

Coordinates and reviews procedures. Offers alternative suggestions to assist in emergency. Suggests additional emergency procedures.

Safety

Does not demonstrate awareness or follow safety procedures.

Is aware of safety procedures and reports any unsafe conditions to supervisor.

Follows all safety and security policies and procedures.

Is proactive in managing safety. Provides input to make work environment safer and more secure.

**Component 2: Accounting Support Element:**

Budgeting/Accounting Procedures

Does not or is not able to follow basic budgeting or accounting procedures.

Completes basic budgeting/accounting procedures with explicit supervisor directions.

Accurately completes basic accounting or budgeting procedures with minimal direction.

Clearly understands budget/accounting procedures and is able to initiate and execute them with little or no direction.

Financials

Is unable to create accurate financial statements. Misses key information or has errors.

Creates financial statements/documents that are generally correct and thorough. Has occasional errors.

Financial statements and documents are consistently accurate and thorough. Checks own work.

Has thorough understanding of how errors in their work impact the District system and proactively seeks to minimize that impact.

Reconciliations

Can't be counted on to reliably balance inputs and outputs.

Usually balances input and output but has occasional errors.

Reconciliations between inputs and outputs are consistently thorough and accurate.

Proactively seeks ways to improve reconciliation process to increase accuracy and decrease time needed.

Requisitions

Loses track of requisitions or fails to process in a timely manner.

Manages their role with requisitions fairly well with occasional difficulties or errors.

Consistently manages the requisition process successfully. Can quickly and accurately respond to questions.

Initiates and executes procedures in the requisition process that increase efficiency. Supports/trains others.

Reports/Records	Needed reports or records are consistently missing, inaccurate, or late.	Needed reports or records are usually accurate with occasional errors or missed deadlines.	Needed reports/records are consistently accurate, thorough, complete and on-time.	Proactively manages process of producing needed records/reports. Anticipates and plans for needs and changes.
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**Domain 4: Professional Responsibilities**  
**Component 1: Contribution to School/District**  
**Element:**

Punctuality	<b>Unsatisfactory</b> Frequently late, and often late for meetings.	<b>Satisfactory</b> Arrives on time and leaves at end of work day. Attends meetings on time.	<b>Proficient</b> Arrives early and is ready at his/her designated time. Is timely and prepared for meetings.	<b>Distinguished</b> Arrives early to be ready at his/her post and has prepared for next day's activities before departure. Arrives early for meetings and has prepared for meeting in advance.
Professional Appearance	Presents an inappropriate appearance; does not look presentable.	Is occasionally careless or inappropriate in appearance.	Consistently presents an appropriate, well-groomed appearance.	Always presents an excellent example of appropriate, professional appearance.
Outlook/Resiliency	Displays lack of enthusiasm. Is critical and negative.	Usually demonstrates a positive outlook.	Consistently displays considerable enthusiasm and a positive approach.	Manifests an uncommonly positive attitude which gives others an uplift.
Confidentiality	Frequently fails to respect confidentiality of issues that have occurred. Takes advantage of position to be "in the know."	Usually respects confidentiality issues.	Understands and follows standards for confidentiality; corrects others who may violate confidentiality.	Demonstrates a high degree of confidentiality in all aspects of their work. Refuses to tolerate any lack of confidentiality.
Flexibility/Adaptability	Finds it difficult to be receptive to new ideas, tasks, or procedures.	Generally open to new ideas and will change his/her approach if asked.	Typically receptive to new ideas and tasks; deals with new information and situations well.	Consistently demonstrates flexibility to handle new situations and will adapt approach to meet a need.
Teamwork	Is reluctant or unwillingly to be part of a team.	Generally recognizes the need for teamwork	Builds productive work relationships with	Consistently contributes to or leads efforts to create

	Mocks the team process or is insensitive to effect of their actions on others.	in the office. Tries to be sensitive to others.	others. Supports others' efforts to be successful.	a strong, effective, smoothly running team.
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**Component 2: Professional Growth  
Element:**

Goal Setting	Has made no attempts to set or work toward individual goals for growth.	Has difficulty focusing on goals for growth.	Demonstrates positive effort to set and implement goals for professional growth.	Uses goal setting and implementation as an excellent opportunity for personal growth, and growth of whole unit.
Acceptance of New Responsibilities	Unwilling to accept new or different responsibilities.	Occasionally accepts new responsibilities and attempts to follow through to best of ability.	Typically receptive to new responsibilities and willingly implements to best of ability.	Eagerly seeks opportunities to broaden field of responsibilities and skills.
Alignment	Focuses efforts only on own needs or needs of own building or department.	Generally focuses on organizational goals while advancing goals of own building or department.	Displays initiative while ensuring efforts align with school district goals/initiatives.	Develops personal and unit goals out of district initiatives. Looks to district initiatives to guide and shape goals/efforts.

**Domain 5: Technology**

<b>Element:</b>	<b>Unsatisfactory</b>	<b>Satisfactory</b>	<b>Proficient</b>	<b>Distinguished</b>
Computer Operations/Productivity	Is lacking in basic computer skills. Struggles to use technology effectively.	Displays acceptable computer skills. Attempts to use technology to improve workflow.	Has solid computer skills. Eagerly looks for ways to utilize technology in streamlining work.	Is viewed as a computer expert. Offers frequent suggestions in applying computer tools to increase productivity.
Office Systems/Information Management	Is unable or unwilling to use or correctly use district programs.	Appropriately uses district programs. Enters data accurately and according to district guidelines.	Manages data within district programs. Can "mine" data to provide information and solve problems.	Leverages information within district programs. Skillfully generates needed reports and sees links between available data and unit needs.