CLERICAL SERVICES

C.1. Communication Standard: ability to effectively listen and communicate (written and verbal) with a diverse audience including students, parents/guardians, staff, visitors, and community

Foundational	Proficient	Advanced/Mastery
Collect and share information in a professional and efficient manner. ○ provide requested general information to students, parents/guardians, staff, visitors, and community. ○ understand and follow oral and written directions ○ share accurate information in a timely fashion **Know expectations and guidelines for communicating in routine, sensitive, and confidential matters.**[RM] ○ operate the school intercom system and make announcements in a clear and pleasant voice ○ arrange appointments and maintain a schedule/calendar for administrator or designee and other assigned staff ○ attend required staff meetings and trainings ○ know emergency codes and phrases ○ access and respond to emails, texts, and other required formats ○ report factually and promptly any unusual situations or events to administration or designee **Engage students, parents/guardians, staff, visitors, and community politely and positively.** ○ greet students, parents/guardians, staff, visitors, and community in person or via phone with a smile and pleasant tone ○ share and reinforce expectations for positive school wide behavior (e.g., be safe, be responsible, be respectful) ○ listen with empathy to concerns of students, parents/guardians, staff, visitors, and community ○ seek to understand the needs of students, parents/guardians, staff, visitors, and community by asking clarifying questions and paraphrasing responses to confirm understanding of requests ○ use professional language in all communications (e.g., conversations, email, written correspondence, and public meetings)	**Manage information important to creating a safe learning environment.** ○ provide comprehensive and accurate information to students, parents/guardians, staff, visitors, and community ○ assist administrator or designee and educators in handling interruptions, asking clarifying questions to determine immediacy of need ○ serve, as appropriate, on staff committees to collect colleagues' input and share decisions and outcomes ○ participate in professional learning concerning effective communication ○ discuss with supervisor regarding emergencies, training needs, missing work, specific task expectations, etc. in a timely manner ○ coordinate dissemination of information ○ write emails, texts, and reports as required by job duties that are clear and grammatically correct **Act as a liaison between school and community when interacting with and assisting students, parents/guardians, staff, visitors, and community.**[RM] ○ explain and reinforce school/district expectations for a positive learning environment ○ research and provide comprehensive and accurate information ○ facilitate transfer of information between school site/program and outside agencies and districts ○ use corrective feedback to discourage inappropriate behavior and respect the individual ○ know when and how to intervene in escalating situations (e.g., tone of voice, proximity, stance, etc.) ○ use language that reinforces the positive academic and social expectations to increase appropriate school behavior	**Be responsible for critical worksite/district communications.**[L] ○ de-escalate challenging behavior of students, parents/guardians, staff, visitors and community with clear, calm verbal and nonverbal communications ○ handle difficult conversations with calm a demeanor ○ work collectively with staff to share expectations and deadlines for the completion of large or time-sensitive projects or emergencies (e.g., grant applications, school improvement plans, school annual opening and closing procedures, etc.) ○ write and compile reports, grant proposals, and other important documents ○ call for assistance, as needed, giving clear details about medical, security, or other emergencies ○ maintain positive internal communication system, ensuring instructional, probation, and support staff are kept informed of needed information **Mentor/coach others in role-alike positions on effective, professional, and culturally responsive communication.**[M] ○ train other clerical staff in communication expectations and procedures ○ stay current and share best practices relating to communication strategies ○ review written communications for qualities of professionalism, cultural sensitivity, and clarity ○ guide mentees' reflection on interactions with students, parents/guardians, staff, visitors, and community for positive qualities and possible areas of improvement **Recommend areas for improvement in communications.**[L] ○ research and suggest software applications/devices ○ serve on committee or work group gathered to improve communication quality and processes

L Indicates opportunities for leadership. **M** Indicates opportunities for mentoring. **RM** Indicates opportunities for being a role model

C.2. Cultural Competence Standard: ability to examine one's own cultural context, understand cultural contexts of others, and interact across cultural contexts with sensitivity to differences (e.g., economic, race, gender, and disability)

Foundational	Proficient	Advanced/Mastery
Recognize differences among and across groups of people.	Understand the value of diversity in a learning environment in order to create opportunities that will include and maximize students' strengths.	Identify and address the consequences of inequities based on racial, socioeconomic, gender, disability or other aspects of identity or group membership.[L]
○ understand social construction resulting in stratification of groups of people	○ access resources to increase knowledge of how race, ethnicity, and other aspects of diversity intersect	○ lead racial justice and equity conversations and learning opportunities with students, parents/guardians, staff, visitors, and community
○ know district policies regarding bullying and harassment/sexual harassment of students and/or staff	○ examine beliefs and attitudes to discern strengths, preferences, and biases of self and others in order to expand understanding of racial and cultural diversity	○ share effective practices and protocols that support physical and/or social-emotional well-being during interracial and intraracial interactions
○ identify cultural norms that vary based on race, language, socioeconomic status, country of origin, gender, religion, and other aspects of identity	○ recognize the unique combination of cultural variables (e.g., race, language, economics, country of origin, gender, religion, ability/disability, etc.) within the worksite/district/community as assets	Use one's own cultural experiences, background, knowledge, skills, beliefs, and values to mentor/coach students and applicable staff in racial justice and cross-cultural experiences.[M, L]
○ aware of systemic, institutional inequities based on race and other differences (e.g., disparity by race/ethnicity and ability/disability in academic achievement and employment)	○ acknowledge power imbalance occurs when one group's identity is established as the norm (e.g., individual can be bullied when another feels empowered to do so)	○ engage in racial and cross-cultural dialogue with students in settings outside the classroom
Recognize one's reaction to individuals or groups who are different from oneself.[RM]	Understand how one's own culture—all experiences, background, knowledge, skills, beliefs, values, and interests—shapes sense of self, and how one fits into family, school, community, and society and impacts interaction with others.[RM]	○ process racial and cross-cultural events with mentee(s)
○ aware of personal implicit and explicit biases		Identify the need for additional cultural competence training and seek those resources.[L]
○ manage personal reactions to difference and expand ability to work with others	○ reflect on own racial, social class, gender experiences to identify generalized social norms and expectations	○ access information on racial-identity development
Build relationships of mutual respect and seek to understand diverse perspectives.[RM]	○ reflect on how worksite/district policies and practices match or are different from own experiences and expectations	○ understand historical development of access to education by race, class, gender, disability, etc. in the United States
○ accept diversity as the normal, and part of working with all students, parents/guardians, staff, visitors, and community effectively	Work collaboratively with members of racially and culturally diverse groups.[L]	
○ learn about and respect different racial and cultural backgrounds, customs, ways of communicating, traditions, and values	○ use racial consciousness and cross-cultural understanding to communicate effectively	
○ speak clearly and with a friendly, courteous tone	○ participate in activities with interracial and cross-cultural groups in school and in the larger community	
○ Acknowledge the value of speaking multiple languages.	○ provide services attending to the racially and culturally diverse needs of students, parents/guardians, staff, visitors, and community	
○ provide worksite/district documents in home language of students, parents/guardians, staff, visitors, and community		
○ learn key phrases in language of students, parents/guardians, staff, visitors, and community		
○ advocate for worksite signage in multiple languages		

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Foundational	Proficient	Advanced/Mastery
	Understand the impact of racial and cultural differences in educational and work environments. ° recognize impact of own behavior on others regardless of intent, and modify behavior when impact is revealed ° apply cross-cultural communication skills (e.g., different ways of showing respect, seeking assistance, sharing personal information, etc.) **Model cultural competence in interactions with students, parents/guardians, staff, visitors, and community.ᴿᴹ** ° express awareness of own implicit and explicit biases ° ask questions to determine if missing perspectives have been sought and included in decisions ° use protocols and skills in cross-cultural and interracial interactions	

C.3. Organization Standard: ability to prioritize, plan, and execute tasks efficiently and effectively

Foundational	Proficient	Advanced/Mastery
Follow procedures for collecting, managing, and maintaining information needed for job duties. ○ student and staff records ○ sign-in/out logs for students, staff and visitors ○ incoming and outgoing communications (e.g., mail, email, other forms of communication) ○ supply distribution ○ update school policies and procedures Manage work duties effectively within time allotted/allocated. ○ input attendance info prior to daily deadline ○ anticipate and respond to requests for information daily Follow directions and recommended operating procedures for job-related equipment. ○ printers, copiers, mail machine ○ maintain clear and clean work area	Maintain ready access to information and equipment necessary for job duties, including notifications and updates. ○ document creation ○ correspondence ○ school policies and procedures ○ electronic storage, retrieval and archival (e.g., records related to student information) ○ agendas, minutes, bulletins, reports Model efficient and effective workload management.^{RM} ○ maintain administrator(s) schedule and appointments ○ newsletter coordination and editing ○ substitute schedule ○ plan completion of paperwork during non-transition times (e.g., before or after student arrival/dismissal) Work cooperatively with other staff on emergencies and/or the completion of large, complex or time-sensitive projects. ○ Board reports, accreditation reports, etc. ○ grant applications or summary reports Perform maintenance tasks for equipment and information systems to ensure readiness to complete job duties. ○ on-site office machine supplies ○ protocol for file naming and storage of hard and electronic files	Use management tools to prioritize tasks and workload in advance for efficiency in daily and long-term project completion.^L ○ use electronic calendar and project management apps to track tasks ○ anticipate future changes in student records (e.g., rollover to next grade level, new reporting requirements, etc.) Analyze systems and procedures for efficiency and effectiveness, and suggest or implement improvements.^L ○ develop better ways to use, store, and retrieve data; correspond with students, parents/guardians, staff, visitors, and community; and archive documents Manage administrative and fiscal functions responsively.^M ○ inventory management ○ respond to department budget requirements ○ requests for use of facilities by outside groups Manage or lead complex, multifaceted projects related to job duties.^L ○ organize documentation of school accreditation or improvement ○ coordinate efforts to increase parent/guardian engagement Mentor/coach others in developing or maintaining organization skills related to job duties.^M ○ coordinate on-the-job training ○ records management ○ efficiencies in scheduling and supply ordering

C.4. Reporting Standard: ability to understand the responsibilities of a mandated reporter and what, when, how, and to whom reports should be filed

Foundational	Proficient	Advanced/Mastery
Know and follow child safety/welfare laws, reporting policies and procedures, and repercussions of noncompliance (i.e., district, Board, state, federal).	Recognize signs of neglect/abuse, substance abuse, or self-injury behavior involving students or staff.	Participate with administrators and other stakeholders in creating and implementing professional development on reporting requirements and processes for staff.[L]
○ mandated reporting	○ observe student demeanor and attitude changes over time based on knowledge of student	○ collect current reporting requirements
○ school expectations for positive behavior, and continuum of responses for unexpected behavior	○ apply understanding of race/cultural competence when reporting concerning behavior to mitigate implicit bias	○ organize information for presentation
Know and report breaches in student and staff codes of conduct, bullying, harassment, and other policies (e.g., acceptable use).	Clarify reporting procedures for others and assist in notifying proper authorities.[M]	Prepare required agency and individual reports and maintain all appropriate records.
○ document all accidents or incidents of student and adult behavior as required by school policy and state law (e.g., breach of code of conduct, bomb threats, or other threats of violence)	○ factual reporting using appropriate terminology	○ attendance, suspension/expulsion, graduation
○ identify and report a situation to the proper administrator	○ potential responses to reporting, and of legal obligations and proceedings that follow reporting	○ deliveries, equipment, inventory
○ understand the chain of command for reporting procedures	○ proper use and submission of all forms and documents	○ regulations
Maintain the necessary documentation for required agency and individual reports.[RM]	Represent the school/district in a professional manner when reporting all incidents.[RM]	○ grant requirements
○ attendance, suspension/expulsion, graduation	○ abide by protocols and confidentiality agreements	○ incident reports
○ regulations		Mentor/coach others in documentation and reporting protocols.[M]
○ grant requirements		○ student and adult behavior
○ deliveries, equipment, inventory		○ accidents or incidences at the worksite or during sponsored activities
○ student behavior and incident reports		
○ student recognition for positive behavior		

C.5. Ethics Standard: ability to maintain a high level of ethical behavior, confidentiality, and privacy of any information regarding students, staff, and all job-related matters

Foundational	Proficient	Advanced/Mastery
Contribute to the learning environment by nurturing positive ethical and moral practices.[RM] ○ be honest in dealing with lost items, reporting, and recordkeeping ○ consider racial and cultural context when making ethical decisions ○ be responsible for security items such as keys, radios, pass-codes ○ use language appropriate to a learning environment ○ maintain high-quality work ○ focus on effective use of time ○ use leave time in accordance with school/district policy ○ exercise self-control, discipline, and integrity Know the laws, district policies, and procedures related to ethical behavior and confidentiality. ○ read and follow Technology Acceptable Use Policy ○ know and use the proper protocol to communicate and address concerns ○ read and follow employee code of conduct/handbook ○ maintain confidentiality concerning student and staff information Develop relationships with students, parents/guardians, staff, visitors, and community based on mutual respect both in and outside the worksite. ○ know and participate in development of positive school culture to support a safe, inclusive learning environment ○ know and follow protocols for positive engagement with parents/guardians and the community	Display ethical and professional behavior in working with everyone who communicates—or is associated—with the worksite.[RM] ○ be responsible and accountable for individual performance and continually strive to demonstrate competence ○ use institutional or professional resources and privileges only for job-related duties ○ consider biases in procedures and practices that compromise social justice when making ethical decisions ○ resolve problems and conflicts, including discipline, according to the law and school policy ○ deal considerately and justly with students, parents/guardians, staff, visitors, and community Maintain professional relationships with students, parents/guardians, staff, visitors, and community both in and outside the worksite. ○ respond in a timely manner to feedback about personal performance and adapt accordingly ○ serve as an individual example of appropriate ethical conduct ○ strive for quality in delivery of services ○ participate in sense of collective responsibility for high-quality work and services ○ be conscious of potential discriminatory practices based on a person's disability, race, gender, cultural background, religion, or sexual orientation Exercise confidentiality and privacy of any information regarding students and staff in all job-related matters by following all rules, regulations, and policies. ○ conduct conversations about students or other confidential matters privately ○ inform appropriate personnel of breaches in confidentiality ○ keep details of confidential matters limited to those who need to support and provide service ○ secure and protect documents from casual viewing	Mentor/coach others in ethical conduct.[M] ○ update staff on new procedures and policies ○ lead workshops or webinars on ethical behavior in educational settings Lead others in ethical behavior.[L] ○ maintain high level of professional competence and integrity when exercising professional judgment ○ respect the values and traditions of the diverse cultures represented in the school/district and community ○ identify and report violations to the code of conduct ○ advocate for change in regulations and statutes when such legislation conflicts with ethical guidelines and/or student/employee rights ○ notice when policies, practices, or laws are harmful to individuals, groups, or the community ○ consider the conflict between the value of obeying the law and the value of serving people ○ initiate action for social justice ○ observe, identify, and explain proper ethical conduct to students and staff ○ stay informed about current social issues that differentially affect students, schools, and communities

C.6. Health & Safety Standard: ability to protect the health and safety of oneself and others by knowing and executing health, safety, and emergency protocols/procedures with fidelity

Foundational	Proficient	Advanced/Mastery
Know basic safety, first aid, and Occupational Safety and Health Administration (OSHA) information as required by job duties.	Maintain valid safety and first aid/CPR/AED certificates as required by job duties.	Participate on safety committees at the school, district, community, and/or state level.ᴸ
◦ ergonomic positioning for working at computer	◦ register for first aid, CPR/AED certification classes every two years	◦ contribute to discussion based on experience and knowledge on health and safety concerns collected by interactions with students, parents/guardians, staff, visitors, and community
◦ first aid certification, AED training, and blood-borne pathogen training	◦ access refresher materials online annually	◦ serve as staff liaison
Know and fulfill assigned and designated functions during practice and active emergency/evacuation procedures.	**Remain current with any new policies/procedures that ensure the health and safety of students and staff.**	◦ take note of action items
◦ keep emergency plan in easily accessed location	◦ know policies/procedures for reporting all accidents occurring on school grounds	**Advocate for positive changes that will improve the health and safety of students and staff.ᴸ**
◦ keep daily attendance records available for cross-checking with student and staff count	◦ manage safety hazard reports	◦ post health and safety reminders in public areas of the building
◦ station oneself at front entrance or designated location to direct emergency responders	**Recognize behaviors that students may exhibit during emergency situations.ᴸ**	◦ suggest improvements to stress points in daily schedule, such as arrival/dismissal
Know worksite rules and policies for student and staff codes of conduct related to safety.ᴿᴹ	◦ plan for students who may have a seizure, run away, hide, etc. in response to stressful situations	◦ coordinate a healthy living campaign with Health and Student Services
◦ fire drill, evacuations, and lockdown procedures	◦ implement protocol for students with a history of unpredictable or violent behavior	**Know terms and acronyms used by public safety officials, Federal Emergency Management Agency (FEMA), and local and state emergency preparedness agencies.**
◦ rules and regulations for dispensing medicine on campus	**Display confidence and poise when making judgment calls during emergency drills or events.ᴿᴹ**	◦ select terms and acronyms* most relevant to school emergencies, learn their meanings, and commit to memory
◦ areas of refuge	◦ use a firm, calm voice and controlled breathing	**Respond to and coordinate emergency and disaster drills/incidents.**
◦ plan for students with a history of unpredictable or violent behavior	◦ use practiced, predetermined phrases for clarity under stress	◦ practice operation of emergency communication devices
Make quick and accurate decisions in difficult situations.	**Honor privacy and exercise confidentiality of all personal information regarding students, parents/guardians, staff, visitors, and community.**	◦ participate in mock emergency drills
◦ activate emergency response team based on guidance from administration	◦ share only needed information with emergency or other assisting staff	**Recognize when a student or colleague is experiencing problems (e.g., educational, behavioral, developmental, health, or safety related) in order to prevent escalation/emergency.**
◦ know procedures for person with a knife or firearm		◦ apply knowledge from daily interaction with students
◦ call for ambulance/emergency support		◦ apply de-escalation skills and procedures
◦ make appropriate staff aware of the situation		

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*The *FEMA Acronyms, Abbreviations & Terms* job aid is housed at fema.gov with a search feature that allows the user to find the meaning of individual acronyms and abbreviations, and lists related to specific areas of disaster management.

Foundational	Proficient	Advanced/Mastery
Maintain security and safety with regard to visitors in the building. ∘ know sign-in procedures and parameters for visitors in the building (e.g., name badge visible, in permitted areas, observing school expectations, etc.) ∘ know how to operate surveillance or other equipment in the school office ∘ know procedures for stranger in the building/on campus		Mentor/coach others regarding emergency policies and procedures.^{M} ∘ evacuation paths and protocols ∘ stranger-in-the-building scenarios ∘ emergency and surveillance equipment ∘ weather- and environment-related emergencies

C.7. Technology Standard: ability to use electronic devices to problem solve and complete work-related duties

Foundational	Proficient	Advanced/Mastery
Operate computer and/or other digital devices and platforms required for job duties. ◦ online or virtual professional development ◦ appropriate software for job requirements ◦ access substitute system ◦ security camera system, telephone/walkie-talkie etiquette and protocols ◦ printer, email, district website, and internet Operate standard office equipment. ◦ copier, report binder, laminator, etc. ◦ entry door intercom and access Input data, as needed, for accurate data management. ◦ input and access personal information (e.g., hours, pay stubs, leave requests, etc.) Know worksite's Acceptable Use Policy. ◦ read annually and submit signature page Know terminology in order to solve common technology issues. ◦ dialogue box, error message window, etc. Learn and adopt new technology methods. ◦ new software versions ◦ visitor badge system, document camera, etc.	Monitor job-related emails routinely.[RM] ◦ at least three times daily or as directed by supervisor Operate advanced settings of office equipment needed to perform job duties. ◦ collate, enlarge, scan ◦ copy spreadsheets Use appropriate job-related programs. ◦ document, spreadsheet, diagram, graph, and report creation ◦ input data, as needed, for accurate data management (e.g., school financial transaction accounts, payroll program, inventory control) ◦ web and document searches Know how to contact Information Technology (IT) department and report specific issues. ◦ designated email for reporting ◦ screen shot of error messages ◦ note clear sequence of events prior to technology issue ◦ understand the reporting procedure for misuse of technology, cyberbullying, inappropriate images, etc. and who to refer the situation to Model safe internet and technology use.[RM] ◦ responsible social media use ◦ appropriate response to phishing, trolling, spam, etc. ◦ know student data privacy rules and/or laws	Research trends/issues pertaining to the job.[L] ◦ clerical supplies ◦ fundraising program options ◦ record/data management Download specific programs for administrative use as directed by supervisor. ◦ electronic forms ◦ electronic calendar Review and manage data, as needed, for accurate data analysis. ◦ track attendance trends, discipline referrals, budget/expense data, etc. Mentor/coach other staff to use internet/software applications safely and independently.[M] ◦ opportunity to answer questions about acceptable use policy ◦ scheduling program ◦ student data management ◦ schedule time with mentee to review digital requirements of job duties ◦ schedule time with mentee to review worksite/district Acceptable Use Policy Manage a social media presence.[L] ◦ previews of upcoming school events and info messages ◦ feedback from students, parents/guardians, staff, visitors, and community via worksite/district Facebook page and/or online platform

C.8. Professionalism Standard: ability to present and conduct oneself in a professional manner in all job settings

Foundational	Proficient	Advanced/Mastery
Align appearance appropriately to job duties and professional expectations as outlined in handbook or job description. ○ business or business casual, appropriate to educational setting Conduct oneself as an ambassador for school or agency.^{RM} ○ model school procedures and expectations ○ greet students, parents/guardians, staff, visitors, and community in a dignified, positive manner ○ respond to requests for information promptly ○ provide appropriate information to students, parents/guardians, staff, visitors, and community ○ demonstrate honesty and integrity in making decisions ○ appropriate use of language around students Know the roles and responsibilities of your career field. ○ expected clerical duties for administration ○ expected clerical duties for other staff positions ○ nonclerical duties outlined in job description ○ work independently (e.g., initiate tasks, complete tasks within assigned time frame without prompting) Work collaboratively with a team.^{RM} ○ acknowledge merits of multiple viewpoints or ideas ○ share ideas with and accept ideas of team members ○ understand team structures and how to contribute for the best interest of the students	Project a positive image to the community through communication, involvement, and personal conduct.^{RM} ○ convey willingness to take information ○ be responsive to requests for assistance ○ provide comprehensive and accurate information in routine, sensitive, and confidential matters with students, parents/guardians, staff, visitors, and community ○ communicate clearly and directly Maintain emotional control in stressful situations. ○ use a firm, calm voice and controlled breathing ○ ask clarifying questions Establish and maintain effective working relationships with others both in and outside of the worksite.^{RM} ○ understand needs and perspectives of students, parents/guardians, staff, visitors, and community ○ seek solutions to identified needs with appropriate staff Maintain current knowledge of procedures, policies, and laws.^L ○ seek guidance on immigration status and protections ○ use culturally responsive procedures for enrolling new students Respond appropriately to instruction and feedback. ○ develop strategies for continuous improvement ○ seek to understand specifics of corrective feedback and how to change behavior or processes to improve Shift tasks and priorities when necessary. ○ interrupt or reschedule planned tasks as needed ○ ask clarifying questions to understand needs and new priorities	Seek or maintain connections with the larger community.^L ○ liaison to the PTA ○ liase with community agencies serving students and parents/guardians Engage in the improvement of the profession through active participation in professional organizations.^L ○ attend local union meetings ○ take on a position in local or state union ○ attend clerical and secretarial support webinars or conferences ○ seek resources from the National Association of Educational Office Professionals (NAEOP) or state-level chapter, or similar organization Demonstrate initiative in identifying areas of need and opportunities for improvement.^L ○ processes for tardiness and early dismissal ○ efficient management of documents for staff and public review Seek additional certifications. ○ office/project management courses ○ participate in NAEOP's Professional Standards Program ○ software certificates Mentor/coach others in role-alike positions on professionalism standards.^M ○ communicate importance of office staff's role in fostering a positive learning environment ○ procedures for enrolling new students