Performance Standards and Evaluation Criteria:
Clerk to the Fairfax County School Board

Part 1: Introduction

The Clerk to the School Board plays a central role in the effective operation of the School Board by providing administrative leadership, maintaining accurate records, ensuring compliance with legal requirements, and supporting the work of the Board as a body. This evaluation framework provides a structured process for assessing the Clerk's performance in alignment with the essential duties outlined in the official job description.

The uniform performance standards for the Clerk to the School Board are used to collect and present data to document performance based on well-defined job expectations. They provide a balance between structure and flexibility and define common purposes and expectations, thereby guiding effective leadership and management of the School Board Office. The performance standards also provide flexibility, encouraging creativity, efficiency, and individual initiative. The goal is to support the Clerk's continuous growth and development by monitoring, analyzing, and applying pertinent data compiled within a system of meaningful feedback.

Clearly defined professional responsibilities constitute the foundation of the Clerk's performance standards. A fair and comprehensive evaluation system provides sufficient detail and accuracy so that both the Clerk and the School Board reasonably understand the job expectations. It should be noted that the Clerk works with the School Board, division staff, and other stakeholders to accomplish the performance standards.

The expectations for professional performance are defined using a two-tiered approach of performance standards and performance indicators. Performance standards define the criteria expected when the Clerk performs major duties. Performance indicators provide examples of observable, tangible behaviors that indicate the degree to which the Clerk is meeting each standard. Performance ratings are made at the performance standard level, not at the indicator level.

Part 2: Performance Standards, Indicators, and Rubric

The following performance standards define the criteria expected when the Clerk performs their major duties. Each standard lists performance indicators and a performance rubric that describes levels of performance.

Standard 1: Project Management and Strategic Planning Support

The Clerk oversees strategic project management to improve coordination, efficiency, and overall operations of the School Board Office, collaborates with School Board Members on goals and priorities, and supports strategic planning for the Board.

Performance Indicators (Sample)

1.1. Oversees strategic project management to improve coordination, efficiency, and operations of the School Board Office.
1.2. Works with School Board Members and their staff to identify ways to assist Members with their goals and priorities during their term.
1.3. Tracks and follows through on directives from the School Board to ensure timely completion and communication of results.
1.4. Conducts research on complex administrative matters; collects, organizes, and synthesizes data; completes analysis; and prepares summaries for the Board.
1.5. Maintains thorough knowledge of division structure, operations, programs, regulations, and School Board policies and procedures to inform planning and decision-making.
1.6. Provides oversight of the policy development and analysis capabilities of the School Board Office.
1.7. Oversees administrative support to Board committees and supports committee operations in accordance with Virginia FOIA obligations.
1.8. Coordinates timelines and milestone calendars for recurring Board activities and deliverables to support annual planning.
1.9. Identifies opportunities to streamline processes in the Board Office to enhance quality, timeliness, and service to Board Members and the public.

Performance Rubric (Sample)

- **Highly Effective:** In addition to meeting the requirements for Effective, the Clerk proactively leads cross-functional planning, anticipates needs, and implements improvements that measurably increase coordination, efficiency, and service to the Board.
- **Effective:** The Clerk oversees strategic project management to improve coordination, efficiency, and operations of the Board Office; collaborates with Members on goals and priorities; and supports strategic planning for the Board.
- **Approaching Effective:** The Clerk is inconsistent in overseeing strategic projects and/or supporting strategic planning (e.g., deadlines slip, follow-through is uneven, or planning lacks clarity), resulting in variable coordination and efficiency.
- **Ineffective:** The Clerk fails to oversee strategic project management and/or support strategic planning, resulting in poor coordination, missed deadlines, and limited support for Board priorities.

Standard 2: Office Operations and Oversight

The Clerk manages personnel and the administrative activities and operations of the School Board Office, including liaison work with School Board Member staff, budgeting and procurement, travel and expense processes, and oversight of policy development and analysis to ensure efficient, compliant operations.

Performance Indicators (Sample)

2.1 Manages personnel and oversees the administrative activities and operations of the School Board Office, including oversight of support staff.
2.2 Serves as the principal liaison between the School Board Office and Board Members' staff, overseeing shared administrative processes and providing guidance to Board Members, division staff, and the public.
2.3 Manages the Office budget and procurement functions, including processing receipts and disbursements and providing quarterly financial reports to the School Board.
2.4 Supervises and assists in arranging registration, accommodations, and associated travel for Board Members' local, state, and national meetings.
2.5 Supervises the preparation and processing of expense reports and reimbursements for individual School Board Members.
2.6 Maintains thorough knowledge of division operations, programs, regulations, and Board policies to guide operations and resolve issues.
2.7 Conducts research on complex administrative matters and prepares recommendations to strengthen operations and service delivery.
2.8 Provides oversight of School Board Member appointments to Board committees and administrative support for committee operations consistent with FOIA obligations.
2.9 Provides oversight of the policy development and analysis capabilities of the School Board Office to support Board governance.
2.10 Ensures effective use of office technology and tools to support efficient operations and high-quality deliverables.
2.11 Oversees the effective onboarding and departure of new School Board Office and School Board Member staff.

Performance Rubric (Sample)

- **Highly Effective:** In addition to meeting the requirements for Effective, the Clerk optimizes systems, budget practices, and staff performance, resulting in demonstrably higher service levels and exemplary operational reliability.
- **Effective:** The Clerk effectively manages personnel, operations, liaison work, budget and procurement, travel and expenses, and policy analysis to ensure efficient, compliant operations.
- **Approaching Effective:** The Clerk's management of operations is inconsistent (e.g., delayed processing, incomplete guidance, or gaps in oversight), causing avoidable rework or stakeholder dissatisfaction.
- **Ineffective:** The Clerk fails to manage operations effectively, leading to persistent processing errors, noncompliance, or poor service to Board Members and stakeholders.

Standard 3: Notifications and Recording of Board Actions

The Clerk schedules, attends, and provides support for School Board meetings and hearings; supervises accurate minutes; maintains approved legal records; develops agendas; validates and maintains records requiring the Clerk's signature; distributes Board

materials; and ensures all notifications and records comply with Virginia law and applicable policies.

Performance Indicators (Sample)

3.1 Schedules, attends, and provides direct support for School Board regular meetings, special meetings, closed meetings, public hearings, work sessions, and committee meetings, documenting actions and discussions.
3.2 Supervises the creation and editing of minutes for all School Board meetings and maintains approved legal records of all School Board actions, as required by the Code of Virginia.
3.3 Schedules, attends, and provides essential administrative support for closed session meetings, ensuring confidentiality of materials and compliance with legal requirements.
3.4 Develops and/or coordinates agendas for School Board meetings, work sessions, and committee meetings and ensures appropriate topics are scheduled.
3.5 Records, validates, and maintains all legal records requiring the Clerk's signature and monitors activities to ensure that School Board actions are disseminated completely, accurately, and appropriately.
3.6 Posts and distributes Board packets and all other required information prior to meetings and prepares meeting room arrangements.
3.7 Supervises notification of internal and external stakeholders of regular and special meetings or events of the School Board, where one or more Board Members are present, ensuring compliance with state code requirements.

Performance Rubric (Sample)

- **Highly Effective:** In addition to meeting the requirements for Effective, the Clerk establishes exemplary calendaring, documentation, and compliance systems that produce consistently accurate, timely records and notices with zero material deficiencies.
- **Effective:** The Clerk ensures meetings are properly scheduled and supported; minutes and legal records are accurate and maintained in a timely manner; agendas and materials are prepared; and notifications and records comply with Virginia law and applicable policies.
- **Approaching Effective:** The Clerk's processes for meetings, records, or notifications are inconsistent (e.g., late or incomplete postings, errors in minutes, or lapses in documentation), creating compliance or service risks.
- **Ineffective:** The Clerk fails to ensure accurate records, proper notifications, or compliant processes, resulting in recurring errors, compliance findings, or impaired Board business.

Standard 4: Support of School Board Leadership

The Clerk supports Board leadership by developing the annual meeting calendar, handling sensitive inquiries, liaising with counsel when directed, advising on priorities and

compliance, preparing summaries and communications, notifying Members of required disclosures, and onboarding newly elected Members.

Performance Indicators (Sample)

4.1 Works to develop the annual School Board meeting calendar and coordinates schedule changes throughout the year.
4.2 Personally handles oral or written inquiries from families, administrators, or local officials — often involving sensitive or confidential issues — and provides responses on behalf of the Chair or Members, as directed.
4.3 When directed by the Chair, acts as liaison with the School Board attorney and guides the Board based on federal and state laws and regulations.
4.4 Collaborates with the Chair on determining priorities and activities required for compliance.
4.5 Drafts main points from detailed information, summaries, and syntheses of meetings to support subsequent Board activities and communications.
4.6 Advises the Chair of action items requiring attention and all Members of financial disclosure obligations in compliance with state code requirements.
4.7 Ensures newly elected Board Members are onboarded to FCPS, including orientation, equipment, HR documentation, and professional development opportunities.

Performance Rubric (Sample)

- **Highly Effective:** In addition to meeting the requirements for Effective, the Clerk anticipates leadership needs, prepares high-quality materials that streamline Board decision-making, and ensures seamless coordination with counsel and stakeholders.
- **Effective:** The Clerk provides timely, accurate, and professional support to Board leadership, including calendar development, inquiry response, liaison with counsel when directed, compliance guidance, communication support, disclosure reminders, and onboarding.
- **Approaching Effective:** The Clerk's support to leadership is inconsistent (e.g., delayed responses, incomplete materials, or uneven coordination), reducing the timeliness or effectiveness of Board actions.
- **Ineffective:** The Clerk fails to provide adequate support to Board leadership, resulting in missed deadlines, inadequate materials, or gaps in legal/compliance coordination.

Standard 5: Communication and Stakeholder Engagement

The Clerk fosters effective, professional, and timely communication among Board Members, division staff, families, the public, and officials; drafts correspondence and summaries; and provides guidance on operational and administrative matters.

Performance Indicators (Sample)

5.1 Responds to inquiries from families, administrators, and local or state officials in a professional and timely manner.
5.2 Facilitates effective communication among School Board Members, staff, and the public.
5.3 Drafts correspondence, summaries, and communications on behalf of the Board or for signature by the Chair or Members, as directed.
5.4 Provides guidance to Board Members, division staff, and the public on operational and administrative processes of the School Board Office.
5.5 Communicates in a manner that is clear, informative, and accessible—both verbally and in writing—using correct grammar, punctuation, and structure.
5.6 Engages with diverse stakeholders respectfully, maintains confidentiality where required, and represents the School Board Office with professionalism.

Performance Rubric (Sample)

- **Highly Effective:** In addition to meeting the requirements for Effective, the Clerk proactively develops communications that enhance understanding, transparency, and trust with diverse stakeholders.
- **Effective:** The Clerk communicates professionally and responsively with stakeholders; facilitates effective information flow; and produces clear, accurate, and timely written and verbal communications.
- **Approaching Effective:** The Clerk's communications are inconsistent in timeliness, clarity, tone, or completeness, occasionally causing confusion or delays.
- **Ineffective:** The Clerk fails to communicate professionally or timely, resulting in misunderstandings, stakeholder complaints, or reduced trust.

Standard 6: Professionalism

The Clerk demonstrates behavior consistent with legal, ethical, and professional standards; maintains confidentiality; engages in continuous professional development; and exercises strong organizational, technological, and time-management skills under pressure.

Performance Indicators (Sample)

6.1 Models ethical conduct, integrity, and sound judgment; respects and maintains confidentiality.
6.2 Demonstrates knowledge of issues and trends affecting PreK–12 education and School Board governance practices and procedures.
6.3 Engages in professional development relevant to Clerk duties (e.g., FOIA, Robert's Rules, records practices, communications).
6.4 Works independently with effective organizational skills; meets deadlines and maintains composure in demanding environments.
6.5 Demonstrates proficiency with office technology, including spreadsheet, presentation, and desktop publishing software.
6.6 Meets role-specific licensure/requirements (e.g., maintains notary status, bonding) and evening availability when the Board is in session.

Performance Rubric (Sample)

- **Highly Effective:** In addition to meeting the requirements for Effective, the Clerk sets a professional standard for the organization, mentors others, and contributes to improvements in office practices.
- **Effective:** The Clerk demonstrates professional conduct and confidentiality; maintains role knowledge; pursues growth; and reliably manages time, technology, and workload.
- **Approaching Effective:** The Clerk's professionalism is inconsistent (e.g., lapses in confidentiality, deadlines, or composure; limited growth in role-specific knowledge or skills).
- **Ineffective:** The Clerk does not consistently demonstrate professional conduct or maintain the required skills and reliability, thereby hindering effective service to the Board.

Part 3: Documenting Performance

To provide a comprehensive evaluation, the Clerk's performance can be documented using multiple sources (e.g., self-evaluations, records of completed tasks, feedback from School Board members, examples of communications and projects completed, etc.).

Part 4: Self-Evaluation

The Clerk will use this form annually to reflect on the effectiveness and adequacy of practice based on each performance standard.

Clerk's Name: _____ Date: _____

School Year: _____

1. Project Management and Strategic Planning Support: The Clerk oversees strategic project management to improve coordination, efficiency, and overall operations of the School Board Office, collaborates with School Board Members on goals and priorities, and supports strategic planning for the Board.

- Areas of strength:

- Areas needing work/strategies for improving performance:

2. Office Operations and Oversight: The Clerk manages personnel and the administrative activities and operations of the School Board Office, including liaison work with Members' staff, budgeting and procurement, travel and expense processes, and oversight of policy development and analysis to ensure efficient, compliant operations.

- Areas of strength:
- Areas needing work/strategies for improving performance:

3. Notifications and Recording of Board Actions: The Clerk schedules, attends, and provides support for School Board meetings and hearings; supervises accurate and timely minutes; maintains approved legal records; develops agendas; validates and maintains records requiring the Clerk's signature; distributes Board materials; and ensures all notifications and records comply with Virginia law and applicable policies.

- Areas of strength:
- Areas needing work/strategies for improving performance:

4. Support of School Board Leadership: The Clerk supports Board leadership by developing the annual meeting calendar, handling sensitive inquiries, liaising with counsel when directed, advising on priorities and compliance, preparing summaries and communications, notifying Members of required disclosures, and onboarding newly elected Members.

- Areas of strength:
- Areas needing work/strategies for improving performance:

5. Communication and Stakeholder Engagement: The Clerk fosters effective, professional, and timely communication among Board Members, division staff, families, the public, and officials; drafts correspondence and summaries; and provides guidance on operational and administrative matters.

- Areas of strength:
- Areas needing work/strategies for improving performance:

6. Professionalism: The Clerk demonstrates behavior consistent with legal, ethical, and professional standards; maintains confidentiality; engages in continuous professional development; and exercises strong organizational, technological, and time-management skills under pressure.

- Areas of strength:
- Areas needing work/strategies for improving performance:

Part 5: Summative Evaluation

At the conclusion of each evaluation cycle, the Clerk will receive an anonymized version of each School Board member's evaluation across each individual standard as well as a rating across all standards representing the School Board's collective summative evaluation of the Clerk's performance. Ratings for individual standards will be Highly Effective (4 points), Effective (3 points), Approaching Effective (2 points), or Ineffective (1 point). The overall rating will be Highly Effective, Effective, Approaching Effective, or Ineffective, using the following range of overall scores:

Rating	Range
Highly Effective	3.5-4.0
Effective	3.0-3.49
Approaching Effective	2.0–2.99
Inffective	1.0-1.99

Example of Recommended Calculations for Clerk's Performance Evaluation:

Standard	Individual Scores	Overall Scores	Final Score
Standard 1	4, 4, 4, 4, 3, 2 4, 3, 3, 3, 4, 4	42	42 / 12 = **3.5** Highly Effective
Standard 2	4, 4, 4, 4, 3, 2 4, 4, 2, 2, 1, 4	38	38 / 12 = **3.17** Effective
Standard 3	3, 4, 4, 4, 3, 2 3, 3, 3, 3, 4, 4	40	40 / 12 = **3.33** Effective
Standard 4	4, 4, 4, 4, 3, 2 4, 4, 2, 2, 1, 4	38	38 / 12 = **3.17** Effective
Standard 5	4, 2, 4, 4, 3, 2 4, 2, 1, 3, 4, 4	37	37 / 12 = **3.08** Effective
Standard 6	4, 4, 4, 4, 3, 2 4, 3, 4, 3, 4, 4	35	43 / 12 = **3.58** Highly Effective
Final Summative Rating			238 / 72 = **3.31** **Effective**

Recommended for Continued Employment: ☐ Yes ☐ No

The School Board may require the Clerk to receive additional training or coaching (paid for by the School Board Office) to address any standards evaluated as Approaching Effective or Ineffective.