

# RECORDKEEPING & DOCUMENTATION

## Your Personal Professional Folder

Make an appointment with the superintendent's office or the personnel office to review your personnel folder. Make a list of all items in the folder, and make a copy of all items in the folder. Leave one copy of the list signed by you and your witness and dated in the personnel folder. Take one copy of the list with you to place in your private personal file along with all copies of materials on file.

1. Always make your own personal notes about visits or meetings with any supervisor during the year. Include witness' reports and date all materials. (Do not overlook brief visits.)
2. Keep copies of everything you give to your evaluator prior to and during the evaluation cycle.
3. Keep copies of everything given to you by your evaluator during the evaluation cycle.
4. As you receive memos, job targets or evaluations, remember to ask for time to study these and respond later if you need to. When you attach statements or comments on a separate sheet (which will probably be the case since the space provided on the form is usually so small), write on the original "See attached comments." (Always keep copies of what you attach.) When you do sign the forms, put the date in, also. If a space is not provided, write the date beside your name. If an earlier date has been filled in by the evaluator, ask that it be changed to reflect the correct current date.
5. Try to have a witness along for any meeting that might deal with your job security. If you are asked to a meeting with your supervisor concerning your evaluation and his or her supervisor attends also, stop at the door and tell them you will return as soon as you can find a witness. Ask your witness to take notes during the conference.
6. Keep the evaluation cycle in the folder and check off and date events as they occur.
7. Ask for copies of any parent or student complaint lodged against you with names, dates and the specific complaints.
8. Ask the evaluator for copies of any items concerning you in their files. (You may have difficulty getting these but ask anyway. Get positive items as well as any negative.)
9. Contact your UniServ director when you have the first hint of any kind of difficulty concerning your evaluation or your job security.

## Employee File

In case of a problem affecting your position, salary, professional reputation, or financial status, you may be required to produce any or all of these documents. Once a problem occurs, there is usually no time to search out these records.

- Education certificate(s)
- Record of college attendance dates and degrees
- Transcripts of undergraduate and graduate credits and degrees
- Letters of appointment
- Yearly salary notice supplied by school district
- Salary schedule
- Record of accumulated sick leave
- Personal record of use of sick leave and personal leave days
- Records pertaining to retirement
- School district policy on student suspension/expulsion/corporal punishment
- Principal conferences and evaluations
- Documentation of commendations, awards and honors
- Record of non-college job-related seminars, workshops and conferences
- Record of disciplinary techniques and methods used in handling classroom problems (note date and person involved)
- Record of assaults, violence or classroom thefts
- School calendar
- Log of tax-deductible job-related expenses
- Association experiences
- Past work experience



# Items in Your Professional File

Your Name \_\_\_\_\_

Name of Witness \_\_\_\_\_

Date \_\_\_\_\_

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