

<p><b>Personnel and Employee Relations</b> <b>7004</b></p> <hr/> <p>Checklist for Succession of School-Based Administrators</p>	<b>Administrative Application</b>	
	<b>Last Reviewed /Approved on:</b>	January 29, 2019
	<b>References:</b>	Policy 12 – Role of the Director
	<b>Status:</b>	Operational

### Preamble

Administrators with the Regina Catholic School Division (RCSD) assuming or leaving a position are responsible for a number of duties. The following checklist is intended to help address areas that require attention for a successful transition; these areas require a cooperative team approach.

Each year when administrative placements are finalized, all principals and vice-principals (incumbent and designate) will be referred to this application.

### Application

1. When an in-school administrative appointment is made, the School Superintendent will meet with the designate and incumbent to discuss the transition process and official start date at the new site.
2. The incumbent and designate must maintain their current positions and work load until the effective date of the appointment.
3. The incumbent maintains responsibility for scheduling the school for the following year, consulting with the administrator designate.
4. The incumbent may invite input from the designate on staffing, scheduling, and issues that may have long-term implications.
5. Meetings and visitations by the designate to the school site should be minimized until the official appointment date. If meetings are to be held they must be done in consultation with the incumbent.
6. The School's Superintendent, will hold an exit meeting with the incumbent before their last day at the site. Discussions at the meeting shall include but not be limited to the following: budget, facility, scheduling, staff, and school goals.
7. Follow the administrative succession checklist as a guide for both incumbent and administrator designates.
8. A checklist for the succession of school-based administrators accompanies this application.

## **Checklist for the Succession of School-Based Administrators**

### **1. Key of Primary Responsibility**

*The following key applies to the checklist below:*

***D - Administrator Designate (appointed to position but not yet installed)***

***I - Incumbent Administrator (currently holding the position)***

***S – Superintendent***

***A - All of the Above Involved***

### **2. Communication of Placement**

[S] Superintendent talks privately about placement to candidate and immediate supervisor, where applicable

[S] Board informed of placement

[S] Superintendent confirms placement with individual

[S] Director announces new placements

[I] Superintendent notifies Catholic School Community Council Chair

[S] Communications officer sends out biographies to the incumbent administrators for circulation. The biographies are prepared by administrator designate and the communications officer.

[A] Superintendent meets with the incumbent and administrator designate

### **3. Communication at New Locations**

[D/S] Timeline established when new administrator assumes duties at site

[I/D] Process for new administrator to communicate/meet with staff

### **4. Meetings/Communication at New Site**

• Remaining Administrator  
[I/D] Administrative history of school

• Education Leaders  
[D] Expectations  
[D] School/division goals

• Catholic School Community Councils

- [I/D] Meet with chair/members
- [I/D] Review constitution, operative guidelines, priorities and projects
- Office Manager
  - [D] Duties
  - [D] Expectations
- Maintenance
  - [D] Meet with head engineer
  - [D] Schedules and areas of responsibilities of maintenance staff
- Parish Relationship
  - [D] Meet parish priest and personnel
  - [D] Existing practice
- Learning Improvement Plan
  - [I/D] Review the learning improvement plans
- Teaching Staff
  - [D] Communicate expectations and transition
- Resource officer
  - [D] Involvement

## 5. Scheduling and Staffing

- Course offerings
  - [I] New courses approved
  - [I] Semester offerings
  - [I] Special programs
  - [I] Locally developed courses
- Extra-curricular activities
  - [I/D] Who is doing what
  - [D] All activities covered
- Year-end process
  - [I/D] Details of school year completion
- Start new year process
  - [D] Details of starting new year
  - [D] Reporting periods
- Scheduling staff and students
  - [I] Assignment of staff and timetable creation
  - [D] Timetable adjustments process and timeline
- Special operations/programs
  - [I/D] Cafeteria/nutrition programs
  - [I/D] Special needs division programs
  - [I/D] Community programs
  - [I/D] Bussing
  - [I/D] Special transportation

[D] Food programs  
[I/D] Other

- Education Programs/Pilots Incentives

[I/D] Courses piloted

[I/D] Staff involved with pilots

- Teaching staff

[A] Transfers

[A] Requirements

[D/S] New staff

[I/D] Interns/cooperating teachers

- Support staff

[A] Requirements

[A] Allocation of duties

## 6. Security

- Keys

[I/D] Assignment of keys

- Files

[I/D] Student

[I/D] Teacher

- Safe

[D] Combination

## 7. Budget

- In school

[I] School accounts financial statement

[I] Outstanding accounts

- Education Centre

[I] Status of budget

[I] Outstanding purchase orders

[I] Trust Funds (if applicable)

- SRC

[I] Financial statement

[A] Long-term project commitments

- Banking and signing authority

[I/D] Changeover of signing authority

## 8. Commitments

- Contracts, handbooks, yearbooks, photos, graduation facility

[I/D] Contracts

- Partnerships/Sponsors

- [I/D] Partnership agreements in place
- [I/D] Length of sponsorship
- [I/D] Reciprocal commitments

- Suppliers (School Based Accounts)

- [I/D] Length of contracts
- [I/D] Type of service provided

- System Projects Housed at School

- [A] Status of project
- [A] Liaison with system project coordinator

- School Use

- [I/D] Long-term users
- [I/D] Booking process
- [I/D] Fees charged

## 9. Facility

- Refurbishing plan

- [I/D] School walk about
- [I/D] Status of refurbishing plan
- [D] Immediate needs of facility
- [A] Accessibility of building and facilities to physically challenged

- Booking of facility

- [I/D] Long-term booking
- [I/D] Special events

- Occupational Health and Safety

- [D] Review history
- [I/D] Committee membership
- [I/D] Status of outstanding issues
- [D] Athletic equipment inspection
- [D] Playground equipment

- School emergency plan

- [D] Review plan

## 10. Files/Documents

- Personal

- [I] Removal of personal material
- [I/D] Security of remaining files

## 11. Inventory

- Security

- [I] Secure location of equipment and supplies

- Technology

- [I/D] Required repairs

[I/D] Inventory of equipment

- Equipment on Loan
  - [I/D] Itemized list of equipment on loan

## 12. Other considerations

- Bussing/Taxi Use
  - [I/D] Special bussing arrangements
  - [D] Bussing for physically challenged individuals
- Community
  - [I/D] Student and neighbourhood dynamics

## 13. Records/Forms

- Update, complete and follow-up
  - [I] Education Centre forms
  - [I] Ministry of Education marks submitted
  - [I] Agencies follow-ups
- Student
  - [I] Marks recorded
  - [I] Awards selected
  - [I] Summer school forms sent in
  - [D] Summer school marks received
  - [D] Students notified of summer school results
  - [I] Computer information, processed, backed up and stored
- Staff evaluations
  - [I] Status of C2PG and follow-up
  - [I] Supervisor reports submitted to superintendent
  - [D/S] Status of staff supervision reports
- Ministry of Education – marks
  - [I] Submitted