	Personal/Position Information
Name:	
Period Covered:	
Position:	
Reviewed by:	
Title:	
Position Start Date:	
Community:	
Region:	

Instructions:

The information contained in this evaluation is strictly confidential. The supervisor will meet with the employee to review the employee's performance and complete the Community Government Performance Evaluation Form. Input from the employee is critical. The employee will have an opportunity to make comments concerning the review in the employee comments section of this form. The information will be used to develop an individual training plan for the employee as well as a training plan for the community.

The employee will be rated as follows for each competency (P):

Each competency is to be rated as follows (S):

1 – Needs significant improvement – employee is unable to the complete task or	
perform the function in a satisfactory manner even though assistance is routinely	
provided	

2 – Needs improvement - employee can complete the task or perform the function with considerable assistance

3 – Satisfactory – employees can complete the task or perform the function in a satisfactory manner with little or no assistance

 $4 - Very \ good - employee$ consistently completes the task or performs the function in an above average manner with little or no assistance

5 – Outstanding – employee consistently completes the task or performs the function at a very high level with little or no assistance

- 1 Competency has little significant to the position
- 2 Competency has minor significance to the position
- 3 Competency is important to the position
- 4 Competency has major significance to the position
- 5 Competency is critical to the effective performance of the position

For more information on how to complete this review please contact the Regional Office of the Department of Municipal and Community Affairs or the MACA School of Community Government.

Major Category	Skill		Subskill					
Financial Management	Perform cash management		Follow GAAP	Collect and deposit funds	Monitor spending			
	Training Requested?		P S 5	P S 5	P S 5			
	Administer finances		Order office supplies	Prepare Assist with financial preparation corresponden for audit ce				
	Training Requested?		P S 4	P S 4	P S 4			
	Administer the payroll system	I	Set up employee files	Process TD1s	Calculate salary	Calculate employee benefits	Calculate group insurance plan contributions	Calculate pension plan contributions
	Training Requested?		P S 5	P S 5	P S 5	P S 5	P S 5	P S 5
			Calculate source and misc. deductions	Calculate payroll tax	Verify time sheets	Process/input payroll	Verify data entries	Prepare WCB premium reports
			P S 5	P S 5	P S 5	P S 5	P S 5	P S 4
			Prepare and remit source deductions	Prepare and remit payroll tax	Prepare journal summaries	Prepare payroll summary	Update in-lieu time	
			P S 5	P S 5	P S 4	P S 4	P S 4	

Major Category	Skill	Subskill
Financial Management cont'd	Administer the payroll system	Update leave creditsCompile monthly attendance
	Training Requested?	P S 4 P S 4 P S 4 P S 5 P S 5 P S
		PrepareVerify codingObtainBatch paycasual payrollof pay sheetssignaturessheets for data entry
		P S 4 P S 5 P Š 4
	Manage projects	Monitor contracts
	Training Requested?	P S 4
	Process financial transactions (accounts payable)	Input opening entries Enter budgets Input adjusting entries Intries entries entries Enter budgets Input adjusting entries Istings Enter budgets Enter budget
	Training Requested?	P S 4 P S 4 P S 4 P S
		Verify accounts payable, receivable and payroll Reconcile general ledger accounts Prepare monthly financial statements Reconcile accounts monthly and at year end Close out year end documents Maintain financial filin system P S 5 P S 5 P S 4 P S 5 P S 5 P S 5 P S 5 P S 5 P S 5 P S 5 P S 5 P S 5 P S 5 P S 5 P S 5 P S 5 P S 5 P S 5 P S 5 P S 5 S 5 P S 5 S 5 S 5 S 5 S 5 S 5 S 5 S 5 S 5 S 5 S 5 S S S S S S S S S S S S S S

Major Category	Skill	Subskill		
Financial Management cont'd	Process financial transactions (accounts payable) cont'd	Prepare requisitionsCross reference documentsPrepare chequesIssue chequesProcess purchase ordersVerify disburse orders	disbursement	
	Training Requested?		S 4	
		Reconcile payable Reconcile petty cash Prepare aged vendor listing Prepare AP journal summaries Prepare batches for data entry Record a cheques log book P S 5 P S 4 P S 4 P S 4 P S 4 P S 4 P S 4 P S 4 P S 4 P S 4 P S 4 P S 5 S 4 P S 4 P S 5 F S 4 F S 4 F S 4 F S 5 F S 4 F S 5 S 4 F S 5 5 S 4 S 5 5 S 4 S 4 S 4 S 5<	s in	
		Maintain Prepare Verify Issue invoices Collect	0 4	
			receivables	
			S 5	
		Issue receipts Issue customer statements Make bank deposits Reconcile accounts receivable listing Prepare aged journal summar		
		P S 5 P S 5 P S 5 P S 5 P S 4 P	S 4	
	Prepare financial report	Prepare variance reportsPresent balance sheetsPresent income reportsPresent quarterly reportsRemit Goods and Services reportsReview quarterly variance reports	ly	
	Training Requested?		S 3	

Major Category	Skill	Subskill
Financial Management cont'd	Prepare Financial Report cont'd Training Requested?	Print monthly financial monthly reports Distribute monthly financial reports P S 4 P S
	Posses knowledge of financial management Training Requested?	Possess Rnowledge of Rnowledge of<
		Possess Possess Possess knowledge of financial systems knowledge of bookkeeping procedures knowledge of office procedures office P S 4 P S 5 P S 4 I I I
Executive Functions/Council Support	Ensure compliance	Identify applicable legislationDemonstrate familiarity with applicable legislationComply with policies and procedures
	Training Requested? Possess knowledge of council systems	P S 4 P S 5 I Possess knowledge of council systems Possess knowledge of committee systems Possess knowledge of committee systems I I
	Training Requested?	P S 3 P S 2

Major Category	Skill	Subskill
Perform Administrative Functions	Maintain inventories	Maintain purchase order systemMaintain capital asset inventoryMaintain stock inventoryTake inventory
	Training Requested?	P S 4 P S 4 P S 4
	Schedule work	Follow work plansOrganize tasks
	Training Requested?	P S 4 P S 4 I
Manage contracts		Assist with preparation and advertising of tender documents
	Training Requested?	P S 4 I
Technical Skills	Possess computer skills	Use word Use spreadsheet software programs Use database programs Use database software programs Use database software programs Use database software programs Use database software program use software program Software program use software p
	Training Requested?	P S 4 P S 5 P S 3 P S 3 P S 5 P S 4
		Operate computerized accounting programs
		P S 5
Human Resource Management	Work in a team environment	Work cooperatively with otherOversee casual employees

Major Category	Skill	Subskill
	Training Requested?	P S 5 P S 3
	Administer personnel policies	Administer unionAdminister employeeMaintain personnel
	Training Requested?	P S 4 P S 5 P S 5
Communication	Use effective communication	Read and comprehend business documentsWrite clearly and conciselyPractice listening skillsSpeak effectively
	Training Requested?	P S 5 P S 4 P S 4 I I I
	Maintain public relations	Maintain customer service
	Training Requested?	P S 5

Major Category	Skill	Subskill								
Professionalism	Demonstrate good work habits	Manage stressTake directionMotivate selfDemonstrate dependability and 								
	Training Requested?	P S 5 P S 5 P S 5 P S 5 P S 5 P S 5 P S 5 P S 5 P S 5 P S S S S S S S S S S S S S S S S								
	Demonstrate good work habits	Manage timeDemonstrate willingness to perform alternate 								
	Training Requested?	P S 5 P S 4 P S 5 P S 4 P S 5 P S								
		MeetEmployDemonstrateBe a teamdeadlinesanalytical skillsresponsibilityplayer								
		P S 5 P S 4 P S 5 P S 5								
	Possess cultural and political knowledge	Practice cross cultural skillsBe familiar with political situationDemonstrate awareness of traditional knowledgePossess knowledge of community								
	Training Requested?	P S 4 P S 4 P S 4								
Professionalism cont'd	Demonstrate positive personal attributes and ethical behaviour	Accept changeAdapt to situationsCompromiseSeparate personal and professional lifePursue personal and professional developmentDemonstration patience								
	Training Requested?	P S 4 P S 4 P S 5 P S 4 P S								
		Maintain a Demonstrate Possess								

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Comments:

1. Supervisor's comments

2. Expectations for the coming year/workplan

3. Employee goals and objectives

4. Career Goals

5. Recommended training

6. Employee Comments

Employee:	Supervisor:
Title:	Title:
Signature:	Signature:
Date:	Date: