

**CLERK/RECEPTIONIST
Training Needs Assessment Evaluation Form**

Personal/Position Information

Name: _____

Period Covered: _____

Position: _____

Reviewed by: _____

Title: _____

Position Start Date: _____

Community: _____

Region: _____

CLERK/RECEPTIONIST

Training Needs Assessment Evaluation Form

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:

- 1 – Needs significant improvement – employee is unable to complete task or perform function in a satisfactory manner even though assistance is routinely provided
- 2 – Needs improvement - employee can complete task or perform function with considerable assistance
- 3 – Satisfactory – employee can complete task or perform function in a satisfactory manner with little or no assistance
- 4 – Very good – employee consistently completes task or performs functions in an above average manner with little or no assistance
- 5 – Outstanding – employee consistently completed task or performs function at a very high level with little or no assistance

Each competency is to be rated as follows:

- 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.

CLERK/RECEPTIONIST

Training Needs Assessment Evaluation Form

| Major Category | Skill | Subskill | | | | | | | | | | | | |
|--|-------------------------------------|---|---|--|--|--|--|--|-------------|-------------|-------------|-------------|-------------|-------------|
| Administrative Support | Perform administrative tasks | <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 16.6%;">Greet the public</td> <td style="width: 16.6%;">Answer phone calls</td> <td style="width: 16.6%;">Take messages</td> <td style="width: 16.6%;">Direct inquiries</td> <td style="width: 16.6%;">Respond to inquiries when appropriate</td> <td style="width: 16.6%;">Type correspondence, reports and other documents</td> </tr> <tr> <td>P S 5</td> <td>P S 5</td> <td>P S 5</td> <td>P S 5</td> <td>P S 5</td> <td>P S 5</td> </tr> </table> | Greet the public | Answer phone calls | Take messages | Direct inquiries | Respond to inquiries when appropriate | Type correspondence, reports and other documents | P S 5 | P S 5 | P S 5 | P S 5 | P S 5 | P S 5 |
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| | | P S 5 | P S 5 | P S 5 | P S 5 | P S 5 | P S 5 | | | | | | | |
| | | <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 16.6%;">Data enter information</td> <td style="width: 16.6%;">Maintain office files</td> <td style="width: 16.6%;">Perform errands in and out of the office</td> <td style="width: 16.6%;">Maintain a bring forward system</td> <td style="width: 16.6%;">Open the mail</td> <td style="width: 16.6%;">Date stamp the mail</td> </tr> <tr> <td>P S 4</td> <td>P S 4</td> <td>P S 4</td> <td>P S 4</td> <td>P S 4</td> <td>P S 4</td> </tr> </table> | Data enter information | Maintain office files | Perform errands in and out of the office | Maintain a bring forward system | Open the mail | Date stamp the mail | P S 4 | P S 4 | P S 4 | P S 4 | P S 4 | P S 4 |
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| | | P S 4 | P S 4 | P S 4 | P S 4 | P S 4 | P S 4 | | | | | | | |
| <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 16.6%;">Distribute the mail</td> <td style="width: 16.6%;">Take minutes at meetings</td> <td style="width: 16.6%;">Distribute minutes</td> <td style="width: 16.6%;">Coordinate repairs to office equipment</td> <td style="width: 16.6%;">Provide interpreter services</td> <td style="width: 16.6%;">Provide translation services</td> </tr> <tr> <td>P S 4</td> <td>P S 4</td> <td>P S 4</td> <td>P S 3</td> <td>P S 3</td> <td>P S 3</td> </tr> </table> | Distribute the mail | Take minutes at meetings | Distribute minutes | Coordinate repairs to office equipment | Provide interpreter services | Provide translation services | P S 4 | P S 4 | P S 4 | P S 3 | P S 3 | P S 3 | | |
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| P S 4 | P S 4 | P S 4 | P S 3 | P S 3 | P S 3 | | | | | | | | | |
| <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 16.6%;">Enter monthly reports</td> <td style="width: 16.6%;">Maintain ledgers</td> <td style="width: 16.6%;">Maintain dogtag registers and business licenses</td> <td style="width: 16.6%;">Receive payments</td> <td style="width: 16.6%;">Maintain stock inventory</td> <td></td> </tr> <tr> <td>P S 4</td> <td>P S 4</td> <td>P S 4</td> <td>P S 4</td> <td>P S 3</td> <td></td> </tr> </table> | Enter monthly reports | Maintain ledgers | Maintain dogtag registers and business licenses | Receive payments | Maintain stock inventory | | P S 4 | P S 4 | P S 4 | P S 4 | P S 3 | | | |
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| P 4 S 4 | P 4 S 4 | P S | P S | P S | P S | | | | | | | | | |
| Technical Skills | Possess computer skills | <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 16.6%;">Use word processing software programs</td> <td style="width: 16.6%;">Use spreadsheet software programs</td> <td style="width: 16.6%;">Use database software programs</td> <td style="width: 16.6%;">Operate e-mail and Internet</td> <td style="width: 16.6%;">Operate computerized accounting programs</td> <td></td> </tr> <tr> <td>P S 4</td> <td>P S 4</td> <td>P S 3</td> <td>P S 4</td> <td>P S 4</td> <td></td> </tr> </table> | Use word processing software programs | Use spreadsheet software programs | Use database software programs | Operate e-mail and Internet | Operate computerized accounting programs | | P S 4 | P S 4 | P S 3 | P S 4 | P S 4 | |
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CLERK/RECEPTIONIST

Training Needs Assessment Evaluation Form

| Major Category | Skill | Subskill | | | | | | | | | | | | |
|---|---|--|---|---|---|--|--|-------------------------------|---|---|---|---|---|---|
| Communication | Use effective communication | <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 16.6%;">Read and comprehend business documents</td> <td style="width: 16.6%;">Write clearly and concisely</td> <td style="width: 16.6%;">Practice listening skills</td> <td style="width: 16.6%;">Speak effectively</td> <td style="width: 16.6%;">Maintain customer service</td> <td style="width: 16.6%;"></td> </tr> <tr> <td>P <input type="checkbox"/> S <input type="checkbox"/> 4</td> <td>P <input type="checkbox"/> S <input type="checkbox"/> 4</td> <td>P <input type="checkbox"/> S <input type="checkbox"/> 4</td> <td>P <input type="checkbox"/> S <input type="checkbox"/> 4</td> <td>P <input type="checkbox"/> S <input type="checkbox"/> 4</td> <td></td> </tr> </table> | Read and comprehend business documents | Write clearly and concisely | Practice listening skills | Speak effectively | Maintain customer service | | P <input type="checkbox"/> S <input type="checkbox"/> 4 | P <input type="checkbox"/> S <input type="checkbox"/> 4 | P <input type="checkbox"/> S <input type="checkbox"/> 4 | P <input type="checkbox"/> S <input type="checkbox"/> 4 | P <input type="checkbox"/> S <input type="checkbox"/> 4 | |
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| Professionalism | Demonstrate good work habits | <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 16.6%;">Manage stress</td> <td style="width: 16.6%;">Take direction</td> <td style="width: 16.6%;">Motivate self</td> <td style="width: 16.6%;">Demonstrate dependability and accountability</td> <td style="width: 16.6%;">Maintain confidentiality</td> <td style="width: 16.6%;">Make decisions</td> </tr> <tr> <td>P <input type="checkbox"/> S <input type="checkbox"/> 4</td> <td>P <input type="checkbox"/> S <input type="checkbox"/> 4</td> <td>P <input type="checkbox"/> S <input type="checkbox"/> 4</td> <td>P <input type="checkbox"/> S <input type="checkbox"/> 5</td> <td>P <input type="checkbox"/> S <input type="checkbox"/> 5</td> <td>P <input type="checkbox"/> S <input type="checkbox"/> 4</td> </tr> </table> | Manage stress | Take direction | Motivate self | Demonstrate dependability and accountability | Maintain confidentiality | Make decisions | P <input type="checkbox"/> S <input type="checkbox"/> 4 | P <input type="checkbox"/> S <input type="checkbox"/> 4 | P <input type="checkbox"/> S <input type="checkbox"/> 4 | P <input type="checkbox"/> S <input type="checkbox"/> 5 | P <input type="checkbox"/> S <input type="checkbox"/> 5 | P <input type="checkbox"/> S <input type="checkbox"/> 4 |
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**CLERK/RECEPTIONIST
Training Needs Assessment Evaluation Form**

Comments:

1. Supervisor's comments

2. Expectations for the coming year/workplan

**CLERK/RECEPTIONIST
Training Needs Assessment Evaluation Form**

3. Employee goals and objectives

4. Career Goals

CLERK/RECEPTIONIST Training Needs Assessment Evaluation Form

5. Recommended training

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6. Employee Comments

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