

**COMMUNITY ECONOMIC DEVELOPMENT OFFICER
Training Needs Assessment Evaluation Form**

Personal/Position Information

Name: _____

Period Covered: _____

Position: _____

Reviewed by: _____

Title: _____

Position Start Date: _____

Community: _____

Region: _____

COMMUNITY ECONOMIC DEVELOPMENT OFFICER 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 (P):

- 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

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

- 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.

COMMUNITY ECONOMIC DEVELOPMENT OFFICER

Training Needs Assessment Evaluation Form

Major Category	Skill	Sub-Skill																													
Community Economic Development	Develop partnerships	Act a liaison between industry, businesses, governments and clients	Represent the community at meetings on economic development	Get groups to work together	Liaise with other community workers (income support)	Develop community and regional networks	Develop a business registry	P		S	5	P		S	5	P		S	4	P		S	4	P		S	4	P		S	5
		Conduct a SWOT analysis	Participate in economic development planning	Assist with tourism development planning	Develop sector specific economic development plans	Develop profiles of economic region	Consult with various groups concerning plans	P		S	4	P		S	5	P		S	5	P		S	5	P		S	5	P		S	4
	Assist with community strategic planning	Establish and participate on economic development sub-committees (i.e. Tourism)	Attend Investment Review Committee Meetings and Board Meetings	Provide recommendations for community and other economic development programs	Foster and facilitate goals of Chamber of Commerce	Evaluate results of studies and make recommendations	Research potential funding sources	P		S	4	P		S	4	P		S	4	P		S	4	P		S	4	P		S	4
		Provide advisory services	Conduct business scan	Assist community and individual businesses to take advantage of major projects	Assist with job creation	Conduct surveys and research on market opportunities	Consult with agencies, governments, private sector etc. On future opportunities	Identify capital development program opportunities	P		S	4	P		S	5	P		S	5	P		S	4	P		S	4	P		S
Identify opportunities for economic development								P		S	5	P		S	5	P		S	5	P		S	4	P		S	4	P		S	4

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Major Category	Skill	Sub-Skill														
Business Planning	Information Gathering	Discuss business viability	Discuss management abilities	Identify assumptions	Discuss operations	Identify competition	Identify market									
		P	S	5	P	S	5	P	S	5	P	S	5	P	S	5
	Cash flow projection	Information Gathering	Identify personal and financial commitment	Obtain personal net worth statement	Identify personal circumstances											
			P	S	5	P	S	5	P	S	5					
		Cash flow projection	Determine start up costs	Forecast sales	Forecast cash receipts from sales	Determine purchases	Determine operating costs	Review debt repayment								
			P	S	5	P	S	5	P	S	5	P	S	5	P	S
Income statement projection	Information Gathering	Determine financing	Determine owners' withdrawals	Identify capital assets	Allow for income taxes	Consider effects of receivables										
		P	S	5	P	S	5	P	S	5	P	S	5			
	Income statement projection	Determine cost of sales	Establish amortization													
		P	S	5	P	S	5									
Provide advice on preparing a draft Business Plan	Information Gathering	Address market position and strategy	Assist with marketing planning	Provide advice on market analysis	Help to set prices	Discuss market branding	Identify market trends									
		P	S	5	P	S	5	P	S	5	P	S	5	P	S	5

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Major Category	Skill	Sub-Skill					
Business Planning	Provide advice on preparing a draft Business Plan	Assist with market surveys	Provide advice on product development	Advise on location	Assist with identification of target markets	Provide demographic analysis and information	Assist with preparation of an executive summary
		P S 4	P S 4	P S 5	P S 4	P S 4	P S 4
		Outline opportunities and production	Assist to substantiate demand				
		P S 4	P S 4				
	Assess business plans	Conduct financial analysis	Review financial ratios	Analyze financial assumptions	Conduct statistical analysis	Read and interpret financial statements	Provide risk assessment
		P S 5	P S 5	P S 5	P S 5	P S 5	P S 5
		Conduct break even analysis	Assist to substantiate demand	Evaluate financial projections	Conduct market analysis	Complete a credit assessment	Investigate background information
		P S 5	P S 5	P S 5	P S 5	P S 5	P S 5
		Appraise assets	Estimate property values	Identify collateral	Assess management abilities	Make recommendations on approval or rejections	
		P S 5	P S 5	P S 5	P S 5	P S 5	
	Assist client with implementation of business	Provide advice on licensing	Consult on payroll tax	Consult on Revenue Canada	Consult on WCB requirements	Consult on business name registration	Refer clients to insurance agents
		P S 5	P S 5	P S 5	P S 5	P S 5	P S 5

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Major Category	Skill	Sub-Skill																													
Financial Skills	Bookkeeping	Complete bank reconciliations	Prepare sale receipts journals	Maintain cash disbursement journals	Make remittances	Maintain a general journal	Develop a synoptic journal	P		S	4	P		S	3	P		S	3	P		S	3	P		S	3	P		S	3
		Ability to apply GAAP	Prepare financial statements					P		S	5	P		S	4																
	Financial Accounting	Financing	Maintain a knowledge of lending practices	Read a credit report	Maintain a knowledge of collateral	Have a knowledge of types of financing		P		S	4	P		S	3	P		S	3	P		S	4								
			Provide counseling	Assess training needs of businesses	Develop or source training	Monitor client and business	Help manage accounts receivables and payables	Establish cash controls	P		S	5	P		S	5	P		S	5	P		S	5	P		S	5	P		S
Communication Skills	Communicate effectively	Conduct site visits	Provide advice on updating business plans	Assist with bookkeeping	Assist with inventory management		P		S	5	P		S	5	P		S	5	P		S	5	P		S	5	P		S	5	
		Write creatively	Write as a third party	Prepare reports	Demonstrate effective written communication skills	Display board management skills	Effective listening skills	P		S	5	P		S	5	P		S	5	P		S	5	P		S	5				

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Major Category	Skill	Sub-Skill																							
Communication Skills	Communicate effectively	Make presentations	Demonstrate effective verbal communication skills	Read and comprehend financial and technical documents	Resolve conflicts	Read legal documents	Use non-verbal communications																		
		P		S	4	P		S	5	P		S	5	P		S	4	P		S	4	P		S	4
Technical Skills	Computer skills	Develop web sites	Make use the Internet	Operate word processing programs	Develop/maintain spreadsheets	Develop and manage databases	Demonstrate a knowledge of computer hardware																		
		P		S	4	P		S	5	P		S	5	P		S	5	P		S	4	P		S	5
		Operate financial computer programs	Demonstrate a knowledge of e-commerce																						
		P		S	5	P		S	5																
Client Services	Provide client services	Advocate for clients	Teach customer service skills	Provide individual and group training	Refer clients as appropriate	Give advice	Provide advice on client development																		
		P		S	5	P		S	5	P		S	5	P		S	4	P		S	5	P		S	5
Administrative Skills	General administration	Collect loans	Write proposals	Remain current with community affairs	Maintain political awareness	Act as a commissioner of oaths																			
		P		S	4	P		S	4	P		S	4	P		S	4	P		S	4				
		Maintain office files	Maintain client files	Recommend policies and procedures	Complete documents	Deliver community economic development programs/Funds	Obtain legal opinions																		
		P		S	5	P		S	5	P		S	4	P		S	5	P		S	5	P		S	5

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Promotion	Promote businesses	Attend trade shows	Develop communication strategies	Develop brochures	Take Photographs	Develop product packaging	Market locations
		P S 4	P S 4	P S 3	P S 3	P S 3	P S 4

Encourage business development	Promote the use of private sector business services						
P S 5	P S 5	P S 5	P S 5	P S 5	P S 5	P S 5	P S 5

Professionalism	Demonstrate good work habits	Manage stress	Take direction	Be self-motivated	Be depended-able	Maintain confidentiality	Make effective decisions
		P S 4	P S 5	P S 5	P S 5	P S 5	P S 4

Demonstrate good work habits	Manage time	Perform related duties	Be punctual	Be flexible	Be organized	Work with minimal supervision
	P S 5	P S 4	P S 5	P S 4	P S 5	P S 5

Meet deadlines	Use analytical skills	Be responsible	Be a team player		
P S 5	P S 5	P S 5	P S 5		

Demonstrate positive personal attributes and ethical behaviour	Accept change	Adapt to situations	Compromise	Separate personal and professional life	Take training	Be patient
	P S 5	P S 4	P S 5	P S 5	P S 5	P S 5

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Professionalism	Demonstrate positive personal attributes and ethical behaviour	Maintain a positive attitude	Be honest	Possess a sense of humour																
		P		S	5	P		S	5	P	4	S	4							
	Respect self and others	Display tact	Cooperate with others	Respond positively to others	Be courteous															
		P		S	5	P		S	5	P		S	5	P		S	4			
	Possess cultural and political knowledge	Practice cross cultural skills	Be familiar with political situation	Demonstrate awareness of traditional knowledge	Possess knowledge of community															
		P		S	5	P		S	4	P		S	4	P		S	4			
	Demonstrate leadership skills	Demonstrate fair, equitable and consistent behaviour	Be accessible	Seek professional and technical advice																
		P		S	5	P		S	5	P		S	5							

**Community Economic Development Officer
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Comments:

1. Supervisor's Comments

2. Expectations For The Coming Year/Workplan

Community Economic Development Officer Training Needs Assessment Evaluation Form

3. Employee Goals And Objectives

4. Career Goals

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5. Recommended Training

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6. Employee Comments

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