

DIRECTOR OF FINANCE
Training Needs Assessment Evaluation Form

Personal/Position Information

Name: _____

Period Covered: _____

Position: _____

Reviewed by: _____

Title: _____

Position Start Date: _____

Community: _____

Region: _____

DIRECTOR OF FINANCE

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.

- 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

- 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.

DIRECTOR OF FINANCE

Training Needs Assessment Evaluation Form

Major Category	Skill	Sub-Skill
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Financial Accounting/ Management				
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Budget				
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Identify priorities of Council	Develop Capital Plan with Works Staff	Consult with Department Heads	Identify and estimate areas of revenue	Estimate expenditures including wages	Conduct financial analysis
P S 5	P S 4	P S 5	P S 5	P S 5	P S 5

Project Costs	Review historical costs	Review year to date expenditures	Identify changes		
P S 5	P S 5	P S 5	P S 5		

Prepare draft budgets	Submit draft budgets to Council	Recommend budget to council	Implement budget	Prepare and review Variance Reports (monthly statements)	Reforecast budgets as necessary
P S 5	P S 5	P S 4	P S 5	P S 5	P S 5

Cash management				
<table border="1" style="width: 100%; height: 20px;"> <tr> <td style="width: 25%;"></td> <td style="width: 25%;"></td> <td style="width: 25%;"></td> <td style="width: 25%;"></td> </tr> </table>				

Establish cash controls	Manage cash flow	Negotiate financing	Manage investments	Monitor department spending	Implement corrective action
P S 5	P S 5	P S 5	P S 5	P S 5	P S 5

Financial Accounting/ Management				
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General Ledger				
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Set up chart of accounts	Enter budget	Cross reference documents	Retrieve sub-ledger accounts	Verify data	Review adjustments
P S 5	P S 5	P S 5	P S 5	P S 5	P S 5

Manage reserves	Reconcile General Ledger Accounts	Prepare General Ledger listings	Prepare trial balance	Ensure bank reconciliations are completed	Prepare monthly financial statements
P S 4	P S 5	P S 4	P S 5	P S 5	P S 5

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Close out year end process	Oversee accounts payable functions	Oversee accounts receivable functions	Manage accounts payables	Manage accounts receivables	Manage payroll and benefits programs
P S 5	P S 5	P S 5	P S 5	P S 5	P S 5

Financial Accounting/ Management

Projects and Programs

Review and make recommendations on Contribution and Block Funding Agreements	Write proposals	Prepare Requests for Proposals	Administer Contribution Agreements and Block Funding	Negotiate contracts	Award contracts
P S 5	P S 4	P S 4	P S 5	P S 4	P S 4

Tax Based

Maintain assessment roles	Set mill rates	Collect and distribute municipal and school tax	Monitor debentures		
P S 0	P S 5	P S 4	P S 5		

Reporting

Prepare income statements	Prepare balance sheets	Report variances	Prepare quarterly reports	Prepare GST reports	Report to the financial committee
P S 4	P S 4	P S 4	P S 4	P S 4	P S 4

Report to the Board/ Council	Provide financial advice to Council and Department Heads	Report to funding agencies			
P S 4	P S 4	P S 5			

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Financial Accounting/ Management

Audit

Follow General Accounting Principles	Follow audit preparation instructions	Respond to audit queries	Review draft audit statements	Submit audit for approval	Act on audit recommendations
P S 5	P S 5	P S 5	P S 5	P S 5	P S 5

Submit audit to funding agencies					
P S 5					

Human Resource Management

Human Resource Administration

Assist with job creation	Assist with the development of performance standards for finance section	Assist with the development of job descriptions	Administer personnel directives	Administer collective agreements/	Recruit staff
P S 0	P S 4	P S 3	P S 4	P S 4	P S 3

Administer employment agreements					
P S 4					

Supervision

Conduct orientation	Develop work schedules	Delegate work	Give directions	Coach employees	Conduct staff meetings
P S 3	P S 4	P S 4	P S 4	P S 4	P S 4

Monitor employees	Conduct performance appraisals	Develop training plans	Facilitate professional development	Provide on-the-job training	Discipline employees
P S 4	P S 4	P S 4	P S 3	P S 4	P S 4

Recommend dismissals					
P S 4					

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Major Category	Skill	Sub-Skill
Computer skills	Manage computer systems	Set up computers and peripherals
		Set up local area networks
		Possess keyboarding skills
		Maintain password security
		Create back up data
		Secure back up data
		P S 3 P S 3 P S 4 P S 4 P S 0 P S 0
		Upgrade software
		Use e-mail and internet
		Use computer-ized accounting programs
		Create spread-sheets
		Use word-processing programs
		Implement MMOS
		P S 3 P S 4 P S 5 P S 5 P S 4 P S 4
		Maintain database files
		P S 4
General duties	General duties	Manage by-laws and policies
		Assist with strategic plans
		Assist with development of policies and procedures
		Implement internal controls
		Adhere to spending controls
		Monitor conflict of interest guidelines
		P S 5 P S 4 P S 4 P S 4 P S 4 P S 0
		Update manuals
		Attend meetings
		Provide advice to Council
		Respond to inquiries
		Take minutes
		Act on Council Directives
		P S 4 P S 3 P S 4 P S 4 P S 0 P S 4
		Provide translation services
		Set up and maintain filing systems
		Accept appointment as acting SAO/ Manager
		Verify employment
		Address complaints
		Repair office equipment
		P S 4 P S 4 P S 4 P S 3 P S 4 P S 3

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Process equipment rentals (i.e. heavy equipment)	Rent or lease equipment	Operate office equipment	Acquire/dispose of assets	Maintain asset register	Purchase insurance
P S 3	P S 3	P S 3	P S 3	P S 3	P S 3

Communications

Communications Skills

Write effectively	Speak effectively	Practice active listening	Read financial and legal documents	Practice customer service	Make presentations
P S 5	P S 4	P S 3	P S 4	P S 4	P S 3

Facilitate meetings	Liaise with outside organizations/ Agencies				
P S 3	P S 3				

Display Personal and Professional Attributes

The incumbent must be:

Patient	Organized	On standby	Accountable	Reliable	Bondable
P S 4	P S 5	P S 3	P S 5	P S 5	P S 5

Approachable	Self-motivated	Supportive	Punctual	Tactful	Fair
P S 3	P S 4	P S 4	P S 4	P S 4	P S 4

Courteous	Honest	Ethical			
P S 4	P S 5	P S 5			

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Comments:

1. Supervisor's comments

2. Expectations for the coming year/workplan

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3. Employee goals and objectives

4. Career Goals

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5. Recommended training

6. Employee Comments

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