

**EXECUTIVE SECRETARY
Training Needs Assessment Evaluation Form**

Personal/Position Information

Name: _____

Period Covered: _____

Position: _____

Reviewed by: _____

Title: _____

Position Start Date: _____

Community: _____

Region: _____

EXECUTIVE SECRETARY

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.

EXECUTIVE SECRETARY

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 3</td> <td>P S 3</td> <td>P S 3</td> <td>P S 3</td> <td>P S 4</td> <td>P S 4</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 3	P S 3	P S 3	P S 3	P S 4	P S 4
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		<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 3</td> <td>P S 4</td> <td>P S 3</td> <td>P S 3</td> <td>P S 3</td> <td>P S 3</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 3	P S 4	P S 3	P S 3	P S 3	P S 3
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<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 3</td> <td>P S 4</td> <td>P S 3</td> <td>P S 3</td> <td>P S 4</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 3	P S 4	P S 3	P S 3	P S 4	P S 3		
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Perform Administrative Functions	Maintain inventories	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 16.6%;">Follow work plans</td> <td style="width: 16.6%;">Organize tasks</td> <td style="width: 16.6%;"></td> <td style="width: 16.6%;"></td> <td style="width: 16.6%;"></td> <td style="width: 16.6%;"></td> </tr> <tr> <td>P S 4</td> <td>P S 4</td> <td></td> <td></td> <td></td> <td></td> </tr> </table>	Follow work plans	Organize tasks					P S 4	P S 4				
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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 the computerized maintenance management system</td> <td style="width: 16.6%;">Operate computerized accounting programs</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>	Use word processing software programs	Use spreadsheet software programs	Use database software programs	Operate e-mail and Internet	Operate the computerized maintenance management system	Operate computerized accounting programs	P S 4	P S 4	P S 4	P S 4	P S 4	P S 4
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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%;">Liaise with community organizations and agencies</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>P <input type="checkbox"/> S <input type="checkbox"/> 4</td> </tr> </table>	Read and comprehend business documents	Write clearly and concisely	Practice listening skills	Speak effectively	Maintain customer service	Liaise with community organizations and agencies	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	P <input type="checkbox"/> S <input type="checkbox"/> 4
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Legislation	Comply with policies and regulations	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 16.6%;">Comply with council resolutions and policies</td> <td style="width: 16.6%;"></td> <td style="width: 16.6%;"></td> <td style="width: 16.6%;"></td> <td style="width: 16.6%;"></td> <td style="width: 16.6%;"></td> </tr> <tr> <td>P <input type="checkbox"/> S <input type="checkbox"/> 4</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </table>	Comply with council resolutions and policies						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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EXECUTIVE SECRETARY

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Major Category	Skill	Subskill																			
Professionalism	Demonstrate positive personal attributes and ethical behaviour	Maintain a positive attitude	Demonstrate honesty	Possess sense of humour	Display tact	Demonstrate diplomacy	Demonstrate courtesy														
		P		S	4	P		S	5	P		S	4								

**EXECUTIVE SECRETARY
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Comments:

1. Supervisor's comments

2. Expectations for the coming year/workplan

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Training Needs Assessment Evaluation Form**

3. Employee goals and objectives

4. Career Goals

EXECUTIVE SECRETARY 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: