

**FINANCE ADMINISTRATION CLERK
Training Needs Assessment e Evaluation Form**

Personal/Position Information

Name: _____

Period Covered: _____

Position: _____

Reviewed by: _____

Title: _____

Position Start Date: _____

Community: _____

Region: _____

FINANCE ADMINISTRATION CLERK Training Needs Assessment e 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

- 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.

FINANCE ADMINISTRATION CLERK

Training Needs Assessment Evaluation Form

Major Category	Skill	Sub-Skill
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Financial Management

Perform cash management

Follow GAAP	Collect and deposit funds	Monitor spending			
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"/> 5			

Administer finances

Order office supplies	Prepare financial correspondence	Assist with preparation for audit			
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			

Administer the payroll system

Set up employee files	Process TD1s	Calculate salary	Calculate employee benefits	Calculate group insurance plan contributions	Calculate pension plan contributions
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"/> 5	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

Calculate source and misc. deductions	Calculate payroll tax	Verify time sheets	Process/ input payroll on ACCPAC	Verify data entries	Prepare WCB premium reports
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"/> 5	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"/> 5

Prepare and remit source deductions	Prepare and remit payroll tax	Update in-lieu time			
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"/> 5			

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Major Category	Skill	Sub-Skill																							
	Possess knowledge of council systems	Possess knowledge of council systems	Possess knowledge of committee systems																						
		P		S	3	P		S	3																
Perform administrative functions	Maintain inventories	Maintain purchase order system	Maintain capital asset inventory	Maintain stock inventory	Take inventory																				
		P		S	3	P		S	4	P		S	4	P		S	4								
Perform administrative functions	Schedule work	Follow work plans	Organize tasks																						
		P		S	4	P		S	4																
	Manage contracts	Assist with preparation and advertising of tender documents																							
		P		S	3																				
Technical Skills	Possess computer skills	Use word processing software programs	Use spreadsheet software programs	Use database software programs	Use utility software program	Operate e-mail and Internet	Operate the computerized maintenance management system																		
		P		S	3	P		S	4	P		S	4	P		S	3	P		S	4	P		S	4
		Operate computerized accounting programs	Operate Simply Accounting Program	Operate ACCPAC																					
		P		S	5	P		S	5	P		S	5												

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Major Category	Skill	Sub-Skill
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Human Resource Management	Work in a team environment	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;">Work cooperatively with other</td> <td style="width: 15%;">Oversee casual employees</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>P</td><td></td><td>S</td><td>5</td> <td>P</td><td></td><td>S</td><td>3</td> <td></td><td></td><td></td><td></td> <td></td><td></td><td></td><td></td> <td></td><td></td><td></td><td></td> </tr> </table>	Work cooperatively with other	Oversee casual employees																			P		S	5	P		S	3																
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Human Resource Management	Administer personnel policies	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;">Administer personnel policies</td> <td style="width: 15%;">Administer employee benefit plans</td> <td style="width: 15%;">Maintain personnel records</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>P</td><td></td><td>S</td><td>4</td> <td>P</td><td></td><td>S</td><td>4</td> <td>P</td><td></td><td>S</td><td>5</td> <td></td><td></td><td></td><td></td> <td></td><td></td><td></td><td></td> </tr> </table>	Administer personnel policies	Administer employee benefit plans	Maintain personnel records																		P		S	4	P		S	4	P		S	5												
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Communication	Use effective communication	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;">Read and comprehend business documents</td> <td style="width: 15%;">Write clearly and concisely</td> <td style="width: 15%;">Practice listening skills</td> <td style="width: 15%;">Speak effectively</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>P</td><td></td><td>S</td><td>4</td> <td>P</td><td></td><td>S</td><td>3</td> <td>P</td><td></td><td>S</td><td>4</td> <td>P</td><td></td><td>S</td><td>4</td> <td>P</td><td></td><td>S</td><td></td> <td>P</td><td></td><td>S</td><td></td> </tr> </table>	Read and comprehend business documents	Write clearly and concisely	Practice listening skills	Speak effectively																	P		S	4	P		S	3	P		S	4	P		S	4	P		S		P		S	
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	Maintain public relations	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;">Maintain customer service</td> <td style="width: 15%;">Maintain tenant relations</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>P</td><td></td><td>S</td><td>5</td> <td>P</td><td></td><td>S</td><td>4</td> <td></td><td></td><td></td><td></td> <td></td><td></td><td></td><td></td> <td></td><td></td><td></td><td></td> </tr> </table>	Maintain customer service	Maintain tenant relations																			P		S	5	P		S	4																
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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

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6. Employee Comments

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