OFFICE MANAGER
Training Needs Assessment Evaluation Form

Personal/Position Information

Name: _____

Period Covered: _____

Position: _____

Reviewed by: _____

Title: _____

Position Start Date: _____

Community: _____

Region: _____

OFFICE MANAGER
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Major Category	Skill	Subskill					

Administrative Support	**Perform administrative tasks**	Design and implement office policies	Establish standards and procedures	Organize office operations and procedures	Supervise office staff	Monitor and record long distance phone calls	Prepare time sheets
	Training Requested?	P | S | 4	P | S | 4	P | S | 4	P | S | 4	P | S | 3	P | S | 4

		Control correspondence	Review and approve supply requisitions	Liaise with other agencies, organizations and groups	Update organizational memberships	Maintain office equipment	
		P | S | 4	P | S | 4	P | S | 4	P | S | 3	P | S | 3	

	Supervise office staff	Assign and monitor clerical and secretarial functions	Recruit and select office staff	Orient and train employees	Provide on the job and other training opportunities	Supervise staff	Evaluate staff performance
	Training Requested?	P | S | 5	P | S | 4	P | S | 4	P | S | 4	P | S | 5	P | S | 4

		Coaching and disciplining staff					
		P | S | 4					

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Major Category	Skill	Subskill					
Administrative Support cont'd	Maintain office records	Design filing systems	Ensure filing systems are maintained and up to date	Define procedures for record retention	Ensure protection and security of files and records	Ensure effective transfer o files and records	Transfer and dispose records according to retention schedules and policies
	Training Requested?	P S 4	P S 5	P S 3	P S 4	P S 4	P S 4
		Ensure personnel files are up to date and secure					
		P S 4					
	Maintain office efficiency	Plan and implement office systems, layout and equipment procurement	Maintain and replenish inventory	Check stock to determine inventory levels	Anticipate needed supplies	Verify receipt of supply	
	Training Requested?	P S 4	P S 3	P S 3	P S 3	P S 3	
Technical Skills	**Possess computer skills**	Use word processing software programs	Use spreadsheet software programs	Use database software programs	Use utility software programs	Operate e-mail and Internet	Operate the computerized maintenance management system
	Training Requested?	P S 5	P S 5	P S 4	P S 4	P S 5	P S 4

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Technical Skills	**Practice technical skills**	Ability to cope with noisy equipment	Ability to read manuals and instructions							
	Training Requested?	P___ S___ 3	P___ S___ 5							
Human Resource Management	**Work in a team environment**	Work cooperatively with others	Oversee casual employees							
	Training Requested?	P___ S___ 5	P___ S___ 4							
Communication	**Use effective communication**	Read and comprehend business documents	Write clearly and concisely	Practice listening skills	Speak effectively					
	Training Requested?	P___ S___ 4	P___ S___ 4	P___ S___ 5	P___ S___ 4					
	Maintain public relations	Maintain customer service	Assist with community events	Liaise with community organizations and agencies						
	Training Requested?	P___ S___ 4	P___ S___ 3	P___ S___ 3						
Legislation	**Comply with policies and regulations**	Comply with council resolutions and policies								
	Training Requested?	P___ S___ 5								

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Major Category	Skill	Subskill

Professionalism	Demonstrate good work habits					

	Training Requested?		Manage stress	Take direction	Motivate self	Demonstrate dependability and accountability	Maintain confidentiality	Make decisions

Manage stress			Take direction			Motivate self			Demonstrate dependability and accountability			Maintain confidentiality			Make decisions		
P	S	4	P	S	4	P	S	4	P	S	4	P	S	4	P	S	4

Manage time			Demonstrate willingness to perform alternate duties as required			Demonstrate punctuality			Demonstrate flexibility			Demonstrate organizational abilities			Work with minimal supervision		
P	S	4	P	S	4	P	S	4	P	S	4	P	S	4	P	S	4

Deadlines			Employ analytical skills			Demonstrate responsibility			Be a team player								
P	S	4	P	S	4	P	S	4	P	S	4						

Comments:

1. Supervisor's comments

2. Expectations for the coming year/workplan

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: