

**PUBLIC UTILITIES CLERK  
Training Needs Assessment Evaluation Form**

**Personal/Position Information**

Name: \_\_\_\_\_

Period Covered: \_\_\_\_\_

Position: \_\_\_\_\_

Reviewed by: \_\_\_\_\_

Title: \_\_\_\_\_

Position Start Date: \_\_\_\_\_

Community: \_\_\_\_\_

Region: \_\_\_\_\_

# PUBLIC UTILITIES CLERK 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):

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

- 1 – Needs significant improvement – employee is unable to complete the 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

- 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.

# PUBLIC UTILITIES CLERK

## Training Needs Assessment Evaluation Form

Major Category	Skill	Sub-Skill
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**Financial Management**

**Process financial transaction**

Ensure monthly water and sewer tickets are submitted in a timely manner	Check and data enter water and sewer tickets	Tear apart tickets and file appropriate portion	Talley up tickets for monthly customer statements	Prepare and mail customer statements	Receive, record and write receipts for any money collected
P     S   5	P     S   5	P     S   5	P     S   5	P     S   5	P     S   5

Reconcile accounts receivable on a weekly and monthly basis	Prepare deposits for revenues and deposit funds	Prepare monthly aged accounts receivable listings	Prepare notices for delinquent accounts	Prepare notices of overdue accounts	Send out disconnect notices for delinquent accounts
P     S   4	P     S   3	P     S   4	P     S   4	P     S   4	P     S   4

Prepare month-end statements	Maintain utilities files and computer records				
P     S   5	P     S   5				

**Administration**

**Perform clerical duties**

Issue licenses and permits for buildings, dogs, businesses, motor vehicles and other areas	Collect money and issue receipts for licenses	Develop and maintain a current and accurate filing system	Reconcile Motor Vehicle and other government services transactions	Collect and record payments for cable and telephones and forward to appropriate company	Balance payments with invoices
P     S   5	P     S   5	P     S   5	P     S   5	P     S   5	P     S   4

# PUBLIC UTILITIES CLERK

## Training Needs Assessment Evaluation Form

Major Category	Skill	Sub-Skill																													
<b>Administration</b>	<b>Maintain land use records</b>	Identify and maintain records of Community Council land	Maintain records of land use and areas for potential development	Manage records of land use agreements and contracts	Receive applications for land use applications	Identify and consult with stakeholders with authority on land issues	Consult applicable legislation and by-laws concerning land use	P		S	5	P		S	5	P		S	5	P		S	4	P		S	4	P		S	4
		Review applications to ensure compliance with land use guidelines and legislation	Submit applications to Council with recommendations for approval or rejection	Draft and execute approved land use documents	Assist residents with completion of land use tax forms			P		S	5	P		S	5	P		S	4	P		S	5								
	<b>Provide receptionist services</b>	Receive, direct and relay telephone messages and fax messages	Direct the general public to the appropriate staff member	Pick up and deliver the mail	Open and date stamp all correspondence	Maintain the general filing systems	Maintain an inventory of office supplies	P		S	5	P		S	5	P		S	5	P		S	5	P		S	5	P		S	4
		Respond to public inquires	Provide word-processing and secretarial support	Coordinate the repair and maintenance of office equipment				P		S	5	P		S	4	P		S	4												

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<b>Knowledge</b>	<b>Possess knowledge of financial management</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%;">Possess knowledge of utilities system</td> <td style="width: 25%;">Possess knowledge of land use application process</td> <td style="width: 25%;">Possess knowledge of office procedures</td> <td style="width: 25%;"></td> </tr> <tr> <td>P     S   5</td> <td>P     S   5</td> <td>P     S   5</td> <td></td> </tr> </table>	Possess knowledge of utilities system	Possess knowledge of land use application process	Possess knowledge of office procedures		P     S   5	P     S   5	P     S   5			
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<b>Perform Administrative Functions</b>	<b>Schedule work</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%;">Follow work plans</td> <td style="width: 25%;">Organize tasks</td> <td style="width: 25%;">Meet deadlines</td> <td style="width: 25%;"></td> </tr> <tr> <td>P     S   5</td> <td>P     S   5</td> <td>P     S   5</td> <td></td> </tr> </table>	Follow work plans	Organize tasks	Meet deadlines		P     S   5	P     S   5	P     S   5			
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<b>Technical Skills</b>	<b>Possess computer skills</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%;">Use computerized accounting programs</td> <td style="width: 25%;">Use word processing programs</td> <td style="width: 25%;">Use spreadsheet programs</td> <td style="width: 25%;">Use database programs</td> </tr> <tr> <td>P     S   5</td> <td>P     S   5</td> <td>P     S   5</td> <td>P     S   3</td> </tr> </table>	Use computerized accounting programs	Use word processing programs	Use spreadsheet programs	Use database programs	P     S   5	P     S   5	P     S   5	P     S   3		
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<b>Human Resource Management</b>	<b>Work in a team environment</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%;">Work cooperatively with others</td> <td style="width: 25%;">Oversee casual employees</td> <td style="width: 25%;"></td> <td style="width: 25%;"></td> </tr> <tr> <td>P     S   5</td> <td>P     S   3</td> <td></td> <td></td> </tr> </table>	Work cooperatively with others	Oversee casual employees			P     S   5	P     S   3				
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<b>Communication</b>	<b>Use effective communication</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%;">Read and comprehend business documents</td> <td style="width: 25%;">Write clearly and concisely</td> <td style="width: 25%;">Practice good listening skills</td> <td style="width: 25%;">Speak effectively</td> <td style="width: 25%;">Maintain good employee relations</td> </tr> <tr> <td>P     S   4</td> <td>P     S   3</td> <td>P     S   5</td> <td>P     S   4</td> <td>P     S   4</td> </tr> </table>	Read and comprehend business documents	Write clearly and concisely	Practice good listening skills	Speak effectively	Maintain good employee relations	P     S   4	P     S   3	P     S   5	P     S   4	P     S   4
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<b>Professionalism</b>	<b>Demonstrate good work habits</b>	<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%;">Be self-motivated</td> <td style="width: 16.6%;">Be dependable</td> <td style="width: 16.6%;">Maintain confidentiality</td> <td style="width: 16.6%;">Make effective decisions</td> </tr> <tr> <td>P     S   4</td> <td>P     S   5</td> <td>P     S   5</td> <td>P     S   5</td> <td>P     S   5</td> <td>P     S   4</td> </tr> </table>	Manage stress	Take direction	Be self-motivated	Be dependable	Maintain confidentiality	Make effective decisions	P     S   4	P     S   5	P     S   5	P     S   5	P     S   5	P     S   4
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	<b>Demonstrate good work habits</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 16.6%;">Manage time</td> <td style="width: 16.6%;">Perform related duties</td> <td style="width: 16.6%;">Be punctual</td> <td style="width: 16.6%;">Be flexible</td> <td style="width: 16.6%;">Be organized</td> <td style="width: 16.6%;">Work with minimal supervision</td> </tr> <tr> <td>P     S   5</td> <td>P     S   4</td> <td>P     S   5</td> <td>P     S   4</td> <td>P     S   5</td> <td>P     S   5</td> </tr> </table>	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
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	P     S   5	P     S   4	P     S   5	P     S   4	P     S   5	P     S   5								
<b>Demonstrate positive personal attributes and ethical behaviour</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 16.6%;">Meet deadlines</td> <td style="width: 16.6%;">Use analytical skills</td> <td style="width: 16.6%;">Be responsible</td> <td style="width: 16.6%;">Be a team player</td> <td style="width: 16.6%;"></td> <td style="width: 16.6%;"></td> </tr> <tr> <td>P     S   5</td> <td>P     S   5</td> <td>P     S   5</td> <td>P     S   5</td> <td></td> <td></td> </tr> </table>	Meet deadlines	Use analytical skills	Be responsible	Be a team player			P     S   5	P     S   5	P     S   5	P     S   5			
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<b>Demonstrate positive personal attributes and ethical behaviour</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 16.6%;">Accept change</td> <td style="width: 16.6%;">Adapt to situations</td> <td style="width: 16.6%;">Compromise</td> <td style="width: 16.6%;">Separate personal and professional life</td> <td style="width: 16.6%;">Take training</td> <td style="width: 16.6%;">Be patient</td> </tr> <tr> <td>P     S   5</td> <td>P     S   4</td> <td>P     S   5</td> <td>P     S   5</td> <td>P     S   5</td> <td>P     S   5</td> </tr> </table>	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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<b>Demonstrate positive personal attributes and ethical behaviour</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 16.6%;">Maintain a positive attitude</td> <td style="width: 16.6%;">Be honest</td> <td style="width: 16.6%;">Possess a sense of humour</td> <td style="width: 16.6%;"></td> <td style="width: 16.6%;"></td> <td style="width: 16.6%;"></td> </tr> <tr> <td>P     S   5</td> <td>P     S   5</td> <td>P   4   S   4</td> <td></td> <td></td> <td></td> </tr> </table>	Maintain a positive attitude	Be honest	Possess a sense of humour				P     S   5	P     S   5	P   4   S   4				
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<b>Respect self and others</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 16.6%;">Display tact</td> <td style="width: 16.6%;">Cooperate with others</td> <td style="width: 16.6%;">Respond positively to others</td> <td style="width: 16.6%;">Be courteous</td> <td style="width: 16.6%;"></td> <td style="width: 16.6%;"></td> </tr> <tr> <td>P     S   5</td> <td>P     S   5</td> <td>P     S   5</td> <td>P     S   4</td> <td></td> <td></td> </tr> </table>	Display tact	Cooperate with others	Respond positively to others	Be courteous			P     S   5	P     S   5	P     S   5	P     S   4			
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**PUBLIC UTILITIES CLERK  
Training Needs Assessment Evaluation Form**

**Comments:**

1. Supervisor's Comments

2. Expectations For The Coming Year/Workplan

**PUBLIC UTILITIES CLERK  
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3. Employee Goals And Objectives

4. Career Goals



# PUBLIC UTILITIES CLERK Training Needs Assessment Evaluation Form

5. Recommended Training

6. Employee Comments

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