

REVENUE CLERK
Training Needs Assessment Evaluation Form

Personal/Position Information

Name: _____

Period Covered: _____

Position: _____

Reviewed by: _____

Title: _____

Position Start Date: _____

Community: _____

Region: _____

REVENUE 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:

- 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.

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Major Category	Skill	Subskill																														
Administer community works programs	Perform administrative tasks	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 16.6%;">Monitor water usage</td> <td style="width: 16.6%;">Determine reasons for loss of water</td> <td style="width: 16.6%;">Monitor utilities usage</td> <td style="width: 16.6%;">Receive payments for water, sewer and utilities</td> <td style="width: 16.6%;">Deposit cash daily</td> <td style="width: 16.6%;">Administer medivac ambulance programs</td> </tr> <tr> <td>P</td><td></td><td>S</td><td>5</td> <td>P</td><td></td><td>S</td><td>5</td> <td>P</td><td></td><td>S</td><td>5</td> <td>P</td><td></td><td>S</td><td>5</td> <td>P</td><td></td><td>S</td><td>5</td> <td>P</td><td></td><td>S</td><td>5</td> </tr> </table>	Monitor water usage	Determine reasons for loss of water	Monitor utilities usage	Receive payments for water, sewer and utilities	Deposit cash daily	Administer medivac ambulance programs	P		S	5	P		S	5	P		S	5	P		S	5	P		S	5	P		S	5
		Monitor water usage	Determine reasons for loss of water	Monitor utilities usage	Receive payments for water, sewer and utilities	Deposit cash daily	Administer medivac ambulance programs																									
		P		S	5	P		S	5	P		S	5	P		S	5	P		S	5	P		S	5							
		<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 16.6%;">Produce utilities bills</td> <td style="width: 16.6%;">Calculate amounts for utilities bills</td> <td style="width: 16.6%;">Verify amounts</td> <td style="width: 16.6%;">Distribute utilities bills</td> <td style="width: 16.6%;">Batch utilities bills for organizations/businesses</td> <td style="width: 16.6%;">Enter water and sewer rates</td> </tr> <tr> <td>P</td><td></td><td>S</td><td>5</td> <td>P</td><td></td><td>S</td><td>5</td> <td>P</td><td></td><td>S</td><td>5</td> <td>P</td><td></td><td>S</td><td>5</td> <td>P</td><td></td><td>S</td><td>5</td> <td>P</td><td></td><td>S</td><td>5</td> </tr> </table>	Produce utilities bills	Calculate amounts for utilities bills	Verify amounts	Distribute utilities bills	Batch utilities bills for organizations/businesses	Enter water and sewer rates	P		S	5	P		S	5	P		S	5	P		S	5	P		S	5	P		S	5
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		P		S	5	P		S	5	P		S	5	P		S	5	P		S	5	P		S	5							
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 16.6%;">Determine trucked water rates</td> <td style="width: 16.6%;">Apply for subsidies for trucked water</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>5</td> <td>P</td><td></td><td>S</td><td>5</td> <td>P</td><td></td><td>S</td><td>5</td> <td>P</td><td></td><td>S</td><td>5</td> <td>P</td><td></td><td>S</td><td>5</td> </tr> </table>	Determine trucked water rates	Apply for subsidies for trucked water					P		S	5	P		S	5	P		S	5	P		S	5	P		S	5	P		S	5		
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P		S	5	P		S	5	P		S	5	P		S	5	P		S	5	P		S	5									
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 16.6%;">Compile source documents</td> <td style="width: 16.6%;">Prepare invoices</td> <td style="width: 16.6%;">Collect receivables</td> <td style="width: 16.6%;">Issue receipts</td> <td style="width: 16.6%;">Reconcile accounts receivable</td> <td style="width: 16.6%;">Make bank deposits</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>4</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>4</td> </tr> </table>	Compile source documents	Prepare invoices	Collect receivables	Issue receipts	Reconcile accounts receivable	Make bank deposits	P		S	4	P		S	4	P		S	4	P		S	4	P		S	4	P		S	4		
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P		S	4	P		S	4	P		S	4	P		S	4	P		S	4	P		S	4									
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P		S	4	P		S	4	P	0	S	0	P		S		P		S		P		S										
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%;">Use utility 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> </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>P</td><td>0</td><td>S</td><td>0</td> <td>P</td><td>0</td><td>S</td><td>0</td> <td>P</td><td></td><td>S</td><td>3</td> <td>P</td><td>0</td><td>S</td><td>0</td> </tr> </table>	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	P		S	5	P		S	4	P	0	S	0	P	0	S	0	P		S	3	P	0	S	0
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Major Category	Skill	Subskill					
Technical Skills	Possess computer skills	Operate computerized accounting programs	Use presentation programs				
		P <input type="checkbox"/> S <input type="checkbox"/> 4	P <input type="checkbox"/> 0 S <input type="checkbox"/> 0	P <input type="checkbox"/> S <input type="checkbox"/>	P <input type="checkbox"/> S <input type="checkbox"/>	P <input type="checkbox"/> S <input type="checkbox"/>	P <input type="checkbox"/> S <input type="checkbox"/>
	Practice technical skills	Ability to cope with noisy equipment	Ability to read manuals and instructions				
		P <input type="checkbox"/> S <input type="checkbox"/> 3	P <input type="checkbox"/> S <input type="checkbox"/> 4	P <input type="checkbox"/> S <input type="checkbox"/>	P <input type="checkbox"/> S <input type="checkbox"/>	P <input type="checkbox"/> S <input type="checkbox"/>	P <input type="checkbox"/> S <input type="checkbox"/>
Human Resource Management	Work in a team environment	Work cooperatively with others	Oversee casual employees				
		P <input type="checkbox"/> S <input type="checkbox"/> 4	P <input type="checkbox"/> 0 S <input type="checkbox"/> 0	P <input type="checkbox"/> S <input type="checkbox"/>	P <input type="checkbox"/> S <input type="checkbox"/>	P <input type="checkbox"/> S <input type="checkbox"/>	P <input type="checkbox"/> S <input type="checkbox"/>
Communication	Use effective communication	Read and comprehend business documents	Write clearly and concisely	Practice listening skills	Speak effectively		
		P <input type="checkbox"/> S <input type="checkbox"/> 4	P <input type="checkbox"/> S <input type="checkbox"/> 3	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"/>	P <input type="checkbox"/> S <input type="checkbox"/>
	Maintain public relations	Maintain customer service	Maintain tenant relations	Assist with community events	Liaise with community organizations and agencies		
		P <input type="checkbox"/> S <input type="checkbox"/> 5	P <input type="checkbox"/> 0 S <input type="checkbox"/> 0	P <input type="checkbox"/> 0 S <input type="checkbox"/> 0	P <input type="checkbox"/> S <input type="checkbox"/> 4	P <input type="checkbox"/> S <input type="checkbox"/>	P <input type="checkbox"/> S <input type="checkbox"/>
Legislation	Comply with policies and regulations	Comply with council resolutions and policies					
		P <input type="checkbox"/> S <input type="checkbox"/> 3	P <input type="checkbox"/> S <input type="checkbox"/>	P <input type="checkbox"/> S <input type="checkbox"/>	P <input type="checkbox"/> S <input type="checkbox"/>	P <input type="checkbox"/> S <input type="checkbox"/>	P <input type="checkbox"/> S <input type="checkbox"/>

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Major Category	Skill	Subskill
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Professionalism

Demonstrate good work habits

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"/> 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"/> 3

Manage time	Demonstrate willingness to perform alternate duties as required	Demonstrate punctuality	Demonstrate flexibility	Demonstrate organizational abilities	Work with minimal supervision
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"/> 4	P <input type="checkbox"/> S <input type="checkbox"/> 4	P <input type="checkbox"/> S <input type="checkbox"/> 4

Meet deadlines	Employ analytical skills	Demonstrate responsibility	Be a team player	Demonstrate honesty	Demonstrate courtesy
P <input type="checkbox"/> S <input type="checkbox"/> 4	P <input type="checkbox"/> S <input type="checkbox"/> 3	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"/>	P <input type="checkbox"/> S <input type="checkbox"/>

Demonstrate positive personal attributes and ethical behaviour

Accept change	Adapt to situations	Compromise	Separate personal and professional life	Pursue personal and professional development	Demonstrate patience
P <input type="checkbox"/> S <input type="checkbox"/> 3	P <input type="checkbox"/> S <input type="checkbox"/> 3	P <input type="checkbox"/> S <input type="checkbox"/> 3	P <input type="checkbox"/> S <input type="checkbox"/> 4	P <input type="checkbox"/> S <input type="checkbox"/> 3	P <input type="checkbox"/> S <input type="checkbox"/> 5

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Comments:

1. Supervisor's comments

2. Expectations for the coming year/work plan

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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: