

**UTILITIES CLERK
Training Needs Assessment Evaluation Form**

Personal/Position Information

Name: _____

Period Covered: _____

Position: _____

Reviewed by: _____

Title: _____

Position Start Date: _____

Community: _____

Region: _____

UTILITIES CLERK

Training Needs Assessment Evaluation Form

Major Category	Skill	Subskill																																	
1. Financial Management	A. Administer the payroll system	1.A.1 Update leave credits	1.A.2 Compile monthly attendance summary	1.A.3 Issue year end attendance summary	1.A.4 Prepare T4 and T4as	1.A.5 Issue T4 and T4a summaries	1.A.6 Issue record of employment	P		S		P		S		P		S		P		S		P		S		P		S					
		Training Requested?																																	
		1.A.7 Prepare casual payroll pay sheets	1.A.8 Verify coding of pay sheets																																
		Training Requested?																																	
		B. Process financial transactions (accounts payable)		1.B.1 Prepare invoices For utilities	1.B.2 Verify invoices for utilities	1.B.3 Issue invoices for utilities	1.B.4 Collect receivables for utilities	1.B.5 Issue receipts	1.B.6 Issue customer statements	P		S		P		S		P		S		P		S		P		S		P		S			
				Training Requested?																															
				1.B.7 Make bank deposits for utilities	1.B.8 Reconcile accounts receivable for utilities	1.B.9 Prepare aged customer listing for utilities																													
				Training Requested?																															
				C. Possess knowledge of financial management		1.C.1 Possess knowledge of accounts receivable	1.C.2 Possess knowledge of payroll systems	1.C.3 Possess knowledge of financial systems	1.C.4 Possess knowledge of bookkeeping procedures	1.C.5 Possess knowledge of office procedures	1.C.6 Comply with policies and procedures	P		S		P		S		P		S		P		S		P		S		P		S	
						Training Requested?																													

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2. Executive Functions/Council Support	A. Possess knowledge of council systems	2.A.1 Possess knowledge of council systems	2.A.2 Possess knowledge of committee systems										
		P <input type="checkbox"/> S <input type="checkbox"/>	P <input type="checkbox"/> S <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Training Requested? <input type="checkbox"/>													
3. Perform Administrative Functions	A. Schedule work	3.A.1 Follow work plans	3.A.2 Organize tasks										
		P <input type="checkbox"/> S <input type="checkbox"/>	P <input type="checkbox"/> S <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Training Requested? <input type="checkbox"/>													
4. Technical Skills	A. Possess computer skills	4.A.1 Use word processing software programs	4.A.2 Use spreadsheet software programs	4.A.3 Operate the computerized maintenance management system (On-Tap)	4.A.4 Operate computerized accounting programs								
		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"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Training Requested? <input type="checkbox"/>													
5. Human Resource Management	A. Work in a team environment	5.A.1 Work cooperatively with other											
		P <input type="checkbox"/> S <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Training Requested? <input type="checkbox"/>													

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5. Human Resource Management cont'd	B. Administer personnel policies	5.B.1 Administer union agreements and employment by-laws	5.B.2 Administer employee benefit plans	5.B.3 Maintain personnel records																			
		Training Requested?		P		S		P		S		P		S									
		6. Communication	A. Use effective communication	6.A.1 Read and comprehend business documents	6.A.2 Write clearly and concisely	6.A.3 Practice listening skills	6.A.4 Speak effectively	6.A.5 Maintain customer service															
Training Requested?				P		S		P		S		P		S		P		S					
7. Professionalism	A. Demonstrate good work habits			7.A.1 Manage stress	7.A.2 Take direction	7.A.3 Motivate self	7.A.4 Demonstrate dependability and accountability	7.A.5 Maintain confidentiality	7.A.6 Make decisions														
		Training Requested?		P		S		P		S		P		S		P		S		P		S	
		7.A.7 Manage time	7.A.8 Demonstrate willingness to perform alternate duties as required	7.A.9 Demonstrate punctuality	7.A.10 Demonstrate flexibility	7.A.11 Demonstrate organizational abilities	7.A.12 Work with minimal supervision																
Training Requested?		P		S		P		S		P		S		P		S		P		S			

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Major Category	Skill	Subskill													
7. Professionalism cont'd	A. Demonstrate good work habits cont'd	7.A.13 Manage time	7.A.14 Demonstrate willingness to perform alternate duties as required	7.A.15 Demonstrate punctuality	7.A.16 Demonstrate flexibility	7.A.17 Demonstrate organizational abilities	7.A.18 Work with minimal supervision								
		P	S	P	S	P	S	P	S	P	S	P	S		
		7.A.19 Meet deadlines	7.A.20 Employ analytical skills	7.A.21 Demonstrate responsibility	7.A.22 Be a team player										
		P	S	P	S	P	S	P	S						
B. Possess cultural and political knowledge	Training Requested?	7.B.1 Practice cross cultural skills	7.B.2 Be familiar with political situation	7.B.3 Demonstrate awareness of traditional knowledge	7.B.4 Possess knowledge of community										
		P	S	P	S	P	S	P	S						
C. Demonstrate positive personal attributes and ethical behaviour	Training Requested?	7.C.1 Accept change	7.C.2 Adapt to situations	7.C.3 Compromise	7.C.4 Separate personal and professional life	7.C.5 Pursue personal and professional development	7.C.6 Demonstrate patience								
		P	S	P	S	P	S	P	S	P	S	P	S		
D. Demonstrate positive personal attributes and ethical behaviour	Training Requested?	7.D.1 Maintain a positive attitude	7.D.2 Demonstrate honesty	7.D.3 Possess sense of humour											
		P	S	P	S	P	S								

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7. Professionalism cont'd	E. Respect self and others	7.E.1 Display tact	7.E.2 Cooperate with others	7.E.3 Respond positively to others	7.E.4 Demonstrate diplomacy	7.E.5 Demonstrate compassion	7.E.6 Demonstrate courtesy															
		P		S		P		S		P		S		P		S		P		S		
	Training Requested?																					
	F. Demonstrate leadership skills	7.F.1 Demonstrate fair, equitable and consistent behaviour	7.F.2 Demonstrate accessibility	7.F.3 Seek professional and technical advice																		
		P		S		P		S														
	Training Requested?																					

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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: