##### Community Administrative Officer Performance Appraisal Template

*[****Note:*** *Revise template to mirror duties as outlined in the job description prepared for this position.]*

Employee Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date of Review: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

| **Standards** | **Tasks** | **Assessment** | **Plan of Action** |
| --- | --- | --- | --- |
| **Financial**  Ensure all monies received are deposited and all expenditures are processed in accordance with council and department directives. | * monies deposited per council and department policy * ensure all expenditures are in accordance with council and department policy and by council resolution * report any unlawful use of funds to council and the department * report to the minister any unlawful use of funds not addressed by council where previously reported to council |  |  |
| Ensure all financial records of council are completed, balanced on a monthly basis and kept in safekeeping in the place designated by council or the council office, in accordance with council and department directives and policies concerning community financial audits. | - review with council, the completed and balanced bank reconciliations and the monthly financial statement by the 20th of the following month  - review with council, accounts receivable and accounts payable listing at each regular council meeting  - ensure proper filing and safekeeping of all financial records, so annual audit can be conducted |  |  |
| Ensure budgets are prepared in sufficient detail and time to allow good planning. | * as per council’s planning meetings, the draft budgets are to be completed in conjunction with the community management plan by Jan. 31 * after council review and approval, adopted budgets and plan are filed with the department by required deadline |  |  |

| **Standards** | **Tasks** | **Assessment** | **Plan of Action** |
| --- | --- | --- | --- |
| Ensure proper collection of taxes. | * ensure all tax payments are recorded and forwarded to the department as per policy * encourage payment of taxes by explaining the tax process to residents and assisting with tax collections * participate in the tax sale process per department direction |  |  |
| **Administration**  Follow the personnel policy developed by the council concerning community employees. | * manage day to day operations * manage and supervise community employees * train community administrative support staff, as requested * advise council of personnel problems and possible solutions * ensure personnel policies are adequate for the community and conform to department policy and applicable laws |  |  |
| Ensure all pertinent correspondence, financial information and council business items are presented at the council meeting and/or are responded to in proper manner and filed in an acceptable filing system. | * prepare a list of all correspondence and business for council to deal with at the council meeting * ensure correspondence is responded to, per council’s direction * ensure proper files are maintained for all council records |  |  |
| Ensure proper agendas and minutes of all council meetings are prepared and distributed to proper agencies. | * ensure agendas are prepared and distributed to council members prior to the meeting * ensure minutes and resolutions are sent to applicable parties |  |  |
| Establish filing system and ensure appropriate record keeping. | * establish filing system and ensure appropriate record keeping (meeting minutes, council resolutions, council policies and procedures, bylaws, annual and monthly fire inspections per Manitoba Fire Code, water quality test results, orders, enforcement actions) |  |  |
| **Municipal Services**  Ensure the terms and conditions of any funding agreement are followed. | * review any programs or agreements council is considering entering into and advise council of any implications (financial or otherwise) before agreement is signed * ensure terms and conditions of agreements entered into are adhered to |  |  |
| Ensure all government legislation, community bylaws and council directions are followed. | * assist council through research and advice, supervision of budgeting, procedures and policies, financing, organizing, planning, analyzing, interpreting and evaluating the community needs relating to infrastructure and general community growth for the development and establishment of local municipal services as defined in The Northern Affairs Act * assist council to liaise with other government agencies to ensure maximum benefit to the community and government departments * assist council and the community in understanding their responsibilities through advice and supervision on procedures, resolutions, bylaws, project development and management, election procedures and the various alternatives and implications of the same * respond to public enquiries and media requests for information or complaints with regard to community operations * develop appropriate communications procedures to ensure all employees are informed regarding the policies and directions of council * monitor the implementation and execution of all council policies and compliance with legislation by responsible staff |  |  |
| **Other**  Participate in training sessions. | * attend all training courses, as required |  |  |

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| **Employer’s Comments (include recommendation on advance in pay (check box where applicable):** | **Employee’s Comments:** |
| \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Employer’s Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Date | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Employee’s Signature  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Date |