



Accounts Clerk Evaluation

Administrative Procedure 2.C.10

Board Governance Policy Cross Reference: 1, 2, 3, 4, 12, 13, 16

Legal Reference:

Date Adopted: October, 1997

Date Amended: October, 2006

Accounts Clerk EVALUATION FORM

Name: _____

Date: _____ Completed by: _____

| Ratings: | Outstanding | Very Good | Satisfactory | Needs Improvement | Not Applicable |
|----------|-------------|-----------|--------------|-------------------|----------------|
|----------|-------------|-----------|--------------|-------------------|----------------|

Outstanding Outstanding is unusual. Genuine “outstanding” performance means performance that is all one can possibly expect in all phases of the work. “outstanding” work performance means a degree of performance that can be achieved but rarely maintained. All ratings of “outstanding” must be accompanied by a written statement containing specific examples that demonstrate the nature of the outstanding performance.

Very Good Very Good means that the employee meets requirements of his/her position satisfactorily throughout the rating period, and in addition consistently performs at a level above such requirements in many areas of his/her total work performance.

Satisfactory Satisfactory means the performance of an employee who consistently meets the requirements of his/her position in a satisfactory manner throughout the rating period. By this standard he/she is a worker who has produced what can be reasonably be expected of a fully competent person in the position.

Needs Improvement Needs improvement means the performance does not meet all requirements of the position, and hence falls below the average of the work group. A “Needs Improvement” rating indicates a positive need for a discussion between the employee and his/her supervisor regarding the shortcomings. A suggestion on how to improve must accompany this comment.

Not Applicable Not applicable means that the particular job characteristic is not an expectation for this employee as part of his/her regular duties at this time.

JOB RELATED SKILLS

| | | | | | | |
|-----|--|----------|-----------|----------|-----------|-----------|
| 1. | Receive and verify internal and external mail, verify account distribution, authorizations and process Accounts Payable | O | VG | S | NI | NA |
| 2. | Process Purchase Orders by verifying budget distributions, approvals, data entry and distributing to vendors and schools. | O | VG | S | NI | NA |
| 3. | Assist the Secretary-Treasurer by providing clerical support and with Accounts Receivable; typing and mailing invoices and following up on account collections as required. | O | VG | S | NI | NA |
| 4. | Maintain an efficient, current and accessible filing system for Accounts Payable vouchers, cheques, purchase orders and the Secretary-Treasurer's correspondence. | O | VG | S | NI | NA |
| 5. | Communicate with suppliers, schools, department and Education Support Centre office personnel – in person, by phone or by correspondence – in a manner both to enhance the efficient and business-like operation of the Accounts Payable Department and to create a good public relations image. | O | VG | S | NI | NA |
| 6. | Assign and enter subs into sub system for approved Leave Forms, maintain an accurate Substitute availability log, maintain filing system for current month's leaves and generate and fax daily/weekly substitute reports to schools. | O | VG | S | NI | NA |
| 7. | Maintain the office postage machine with software updates, funds and printing supplies. Deliver mail to the Post Office daily and pick up mail as required. | O | VG | S | NI | NA |
| 8. | Assist the Secretary-Treasurer with clerical and accounting services for the Evergreen Foundation of Manitoba Inc. | O | VG | S | NI | NA |
| 9. | Operate as a member of the Education Support Centre office team to maintain an efficient and effective telephone system, to maintain the office kitchen and to respond to other cross-related tasks that may be identified by the team or Senior Administration. | O | VG | S | NI | NA |
| 10. | Other related duties as may be assigned from time to time. | O | VG | S | NI | NA |
| 11. | ATTENDANCE | O | VG | S | NI | NA |
| 12. | PUBLIC RELATIONS | | | | | |
| | a) works positively as part of the ESC team | O | VG | S | NI | NA |
| | b) interacts positively with other staff | O | VG | S | NI | NA |

| | | | | | | |
|-----|---|----------|-----------|----------|-----------|-----------|
| | c) interacts positively with the public | O | VG | S | NI | NA |
| 13. | PERSONAL QUALITIES / ATTIBUTES | | | | | |
| | a) punctuality | O | VG | S | NI | NA |
| | b) dependability | O | VG | S | NI | NA |
| | c) cooperation | O | VG | S | NI | NA |
| | d) enthusiasm | O | VG | S | NI | NA |
| | e) judgment | O | VG | S | NI | NA |
| | f) adaptability | O | VG | S | NI | NA |
| | g) confidentiality | O | VG | S | NI | NA |
| | h) personal appearance | O | VG | S | NI | NA |
| | i) attitude to work | O | VG | S | NI | NA |
| | j) accepts responsibility | O | VG | S | NI | NA |
| | k) accepts direction | O | VG | S | O | NA |

Comments:

Growth Plan (Summary)

Name: _____ Date: _____

1. General Information – position description

2. Growth Plan (Goals)

3. Areas of Strength:

4. Suggestions for Improvement:

5. Recommendations/Conclusions:

I have read and received a copy of the evaluation.

Employee Signature

Date

Evaluator's Signature

Date

Comments: (additional sheets may be added if required)