

Appendix J Performance Appraisal Templates

Assistant Community Administrative Officer Performance Appraisal Template

Employee Name: _____

Date of Review: _____

Community: _____

<u>Standards</u>	<u>Tasks</u>	<u>Assessment</u>	<u>Plan of Action</u>
<u>Financial</u> Maintain all financial records of council.	- ensure safekeeping of all financial records, so audits can be done		
Reconcile bank, prepare and present all financial statements, including project reports, at month end.	- prepare bank reconciliations by the 20 th of the following month - submit the monthly financial statement to council by the 20 th of the following month - submit accounts receivable listing to council at each regular council meeting - ensure fire chief and other community employee program reports are received at each regular council meeting		
Process all council expenditures.	- issue accounts payable cheques within two days after approval from council meeting - issue all recurring expenses within deadline to avoid penalty charges		
Receive and deposit all monies of council.	- record receipt of funds daily - make weekly deposits where cash is greater than \$200		
Handle all funds and administration of council projects.	- receive, record and distribute all project funds and reports		
<u>Administration</u> Assist in budget preparation, interpreting legislation and other correspondence.	- supply council with background information concerning budgets and capital projects prior to department due dates - supply council information regarding various legislation such as The Northern Affairs Act and departmental policies		
Prepare or assist in preparing and distributing council meeting agendas, resolutions and bylaws.	- have agenda prepared <u>prior</u> to each council meeting - ability to write all decisions of council in resolution form - comprehensive knowledge of bylaw procedures with respect to deadlines		
Follow-up on all council items of business (keep everyone fully informed on meetings and events).	- within five days of council meeting		

<u>Standards</u>	<u>Tasks</u>	<u>Assessment</u>	<u>Plan of Action</u>
Clerical Receive, record and ensure proper handling of correspondence.	- prescreen incoming correspondence to ensure council deals with all important items		
Relay or respond to correspondence upon council's direction.	- within five days of council direction given		
Act as receptionist in the council office.	- receive all calls and relay all messages within the day, whenever possible		
Take minutes at every regular and special council meeting.	- prepare all meeting minutes and distribute them to members of council and post in public place(s) within five days of council meeting - ensure council adopts all meeting minutes by resolution at next council meeting		
Represent council at meetings upon their request or direction.	- assume responsibility whenever directed to attend		
Maintain regular working hours at council office. These hours are: _____ a.m. to _____ p.m., _____ days per week.	- punctual attendance at office and meetings		
Disclose approved information to public.	- within one day of request		
Immediately report all absenteeism to supervisor.	- prior to _____ a.m.		
Participate in training programs to enable the assistant community administrative officer to carry out the assigned functions.	- attend all training courses, as required - supervise and train administrative support staff, as requested		
Employer's Comments:		Employee's Comments:	

Employer's Signature

Employee's Signature

Date: _____

Community Administrative Officer Performance Appraisal Template

Employee Name: _____ Date of Review: _____

Community: _____

<u>Standards</u>	<u>Tasks</u>	<u>Assessment</u>	<u>Plan of Action</u>
<p><u>Financial</u> Ensure all monies received are deposited and all expenditures are processed in accordance with departmental directives.</p>	<ul style="list-style-type: none"> - monies deposited per departmental policy - ensure all expenditures are in accordance with departmental policy and by council resolution - report any unlawful use of funds to council - report to minister any unlawful use of funds not addressed by council where previously reported to council 		
<p>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 departmental directives and policies concerning community financial audits.</p>	<ul style="list-style-type: none"> - review with council, completed and balanced bank reconciliations by the 20th of the following month - review with council, the monthly financial statement by the 20th of the following month - review with council, accounts receivable and payable listing at each regular council meeting - ensure proper filing and safekeeping of all financial records, so audits can be done 		
<p>Ensure budgets are prepared in sufficient detail and time to allow good planning.</p>	<ul style="list-style-type: none"> - as per council's planning meetings, the draft budget is to be completed in conjunction with the community management plan by Jan. 31 - after council review and approval, budget and plan are submitted to the department by required deadline 		
<p>Ensure proper collection of taxes.</p>	<ul style="list-style-type: none"> - 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 departmental direction 		
<p><u>Administration</u> Follow the personnel policy developed by the council concerning community employees.</p>	<ul style="list-style-type: none"> - 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 departmental policy and applicable laws 		

<u>Standards</u>	<u>Tasks</u>	<u>Assessment</u>	<u>Plan of Action</u>
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.	<ul style="list-style-type: none"> - 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.	<ul style="list-style-type: none"> - ensure agendas are prepared and distributed to council members prior to the meeting - ensure minutes and resolutions are sent to applicable parties 		
<p><u>Municipal Services</u> Ensure the terms and conditions of any funding agreement are followed.</p>	<ul style="list-style-type: none"> - 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 regulations, bylaws and council directions are followed.	<ul style="list-style-type: none"> - 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 		
<p><u>Other</u> Participate in training sessions.</p>	<ul style="list-style-type: none"> - attend all training courses, as required 		
Employer’s Comments:		Employee’s Comments:	

 Employer’s Signature

 Employee’s Signature

Date: _____

Public Works Employee Performance Appraisal Template

Employee Name: _____

Date of Review: _____

Community: _____

<u>Standards</u>	<u>Tasks</u>	<u>Assessment</u>	<u>Plan of Action</u>
<p><u>Water Treatment Plant and Distribution Systems</u> Ensure treatment and distribution of a safe supply of potable water to the community, meets Manitoba government regulations.</p>	<ul style="list-style-type: none"> - record all meter readings as required by the Manitoba government - take daily water tests and record results as required by the Manitoba government - collect the required samples and submit for analysis as required and have results forwarded to Manitoba Sustainable Development - check all components of the system(s) daily for proper operation - perform and record all required servicing as stated in the operation manual - prepare all chemical solutions and backwash and/or replace filters in accordance with the operation manual and record on maintenance management system (MMS) - ensure all thermostats are set and functioning at proper operating levels - check all main and backup system(s) where provided - maintain the system in a clean and orderly condition and ensure facilities are secured with locks - report to council any system failures and take necessary remedial action to prevent freezing damage to components of the system - take all reasonable steps and precautions to ensure a safe potable water supply for the community - complete all training courses to attain the required level of certification to operate the facility - notify council in writing of any needed repair to the facility and be on site when the facility is open to the public as required by regulation - maintain logbook (records) of work done and problems reported and how the problem was corrected 		

<u>Standards</u>	<u>Tasks</u>	<u>Assessment</u>	<u>Plan of Action</u>
<p><u>Wastewater Treatment and Collection Systems</u></p> <p>Ensure collection and treating of all wastewater in the community, meets Manitoba government regulations.</p>	<ul style="list-style-type: none"> - take daily tests and record results as required by the Manitoba government - collect required samples and submit for analysis as required and have results forwarded to Manitoba Sustainable Development - check all components of the system(s) daily for proper operation - perform and record all required servicing as stated in the operation manual - ensure all thermostats are set and functioning at proper operating levels - check all main and backup system(s) where provided - maintain the system in a clean and orderly condition and ensure facilities are secured with locks - report to council any system failures and take necessary remedial action to prevent freezing damage to components of the system - take all reasonable steps and precautions to ensure effluent discharge meets license requirements at all times - complete all training courses to attain the required level of certification to operate the facility - notify council in writing of any needed repair to the facility and be on site when the facility is open to the public as required by regulation - maintain logbook (records) of work done and problems reported and how the problem was corrected 		
<p>Maintain and supply the service of collecting and disposing of solid waste generated in the community, meeting Manitoba government regulations.</p>	<ul style="list-style-type: none"> - provide garbage collection on a weekly basis (_____ day(s) per week) - maintain the local waste disposal site in a neat, reasonably tidy condition and do not engage in burning at any time whatsoever, unless in possession of a burning permit - collect only such garbage as is placed in appropriate bags or secured and placed in enclosed containers and in the event the employee determines that certain residences have not placed their garbage in appropriate bags or containers, notify council of the name and/or location of said residence - be responsible for the operation and maintenance of the waste disposal site and equipment as provided by council - record activities on MMS - notify council of any needed repairs to the site or equipment - be responsible for sorting of all bulky objects such as fridges, stoves, tires, burnables, etc. to a specific location at the waste disposal site 		

<u>Standards</u>	<u>Tasks</u>	<u>Assessment</u>	<u>Plan of Action</u>
<p><u>Maintenance of Community Infrastructure</u> Maintain all community buildings in an efficient manner using a maintenance management system (MMS).</p>	<ul style="list-style-type: none"> - ensure caretaking/cleaning of community buildings - ensure inspections of infrastructure to facilitate repairs as required - keep all doorways, stairs, steps and driveways clear of ice and snow at all times - ensure all buildings are locked and secure at the end of each day - reading and recording of hydro meters on infrastructure - use the MMS to record repairs, projects and daily routines - notify council in writing of any needed repair to the facility and be on site when the facility is open to the public as required by regulation - maintain logbook (records) of work done and problems reported and how the problem was corrected 		
<p>Maintain community parks, playgrounds, yards and green spaces.</p>	<ul style="list-style-type: none"> - keep all park and playground equipment in safe working condition - clean up fallen trees, rake and cut grass as required - maintain gardens, plants and trees as required by council 		
<p>Maintain community roads, ditches and drainage.</p>	<ul style="list-style-type: none"> - advise council of road(s) needing repair, gravel, grading, culverts or snowplowing and seek approval to complete work required - keep ditches, drainage and culverts free of garbage and brush - thaw out frozen culverts and clear ice dams during spring thaw/runoff - keep records of work on MMS 		
<p>Maintain community skating and curling rinks.</p>	<ul style="list-style-type: none"> - keep the rink in order and repair, if required - check all lights and fuel supply - flood rink and paint lines - remove snow from rink - ensure only qualified people work on artificial ice plants - record duties on MMS 		
<p>Maintain community cemetery.</p>	<ul style="list-style-type: none"> - maintain fence around the cemetery and keep cemetery yard cut and clean 		
<p><u>Equipment Maintenance</u> Maintain all community equipment large and small in a safe and operable condition.</p>	<ul style="list-style-type: none"> - implement and use of a MMS or logbooks for community equipment - ensure all required services as stated in manuals are completed to ensure validity of warranties - ensure all equipment is stored safely and securely as directed by council - ensure all license and safety inspections are current for applicable equipment - notify council in writing and record all repairs, cost and who completed repairs - allow only licensed/trained personnel to operate community equipment 		

<u>Standards</u>	<u>Tasks</u>	<u>Assessment</u>	<u>Plan of Action</u>
<p><u>Personal Protective Equipment</u> Maintain all personal protective equipment and wear as required.</p>	<ul style="list-style-type: none"> - ensure all personal protective equipment meets industry standards and is maintained according to manufacturer’s instructions - ensure personal protective equipment is worn as required 		
<p>Employer’s Comments:</p>		<p>Employee’s Comments:</p>	

 Employer’s Signature

 Employee’s Signature

Date: _____

Recreation Director Performance Appraisal Template

Employee Name: _____

Date of Review: _____

Community: _____

<u>Standards</u>	<u>Tasks</u>	<u>Assessment</u>	<u>Plan of Action</u>
<p><u>Programs</u> Assess community needs on an ongoing basis.</p>	<ul style="list-style-type: none"> - develop and deliver a community needs assessment - analyze and evaluate data and present findings to recreation and wellness committee and/or supervisor for action - communicate regularly with residents for feedback and suggestions 		
<p>Support community groups and organizations in the development and delivery of recreation and wellness programs.</p>	<ul style="list-style-type: none"> - network with community organizations that provide recreation and wellness services through meetings and sharing of information and resources - assist clubs and organizations in their development - support existing clubs and organizations - attend meetings on behalf of the community in areas of recreation and wellness and program development 		
<p>Help develop the annual recreation and wellness plan.</p>	<ul style="list-style-type: none"> - work with council and recreation committee/groups to help develop annual recreation and wellness plan - monitor and evaluate annual plan on a monthly basis - prepare a report on the plan (April to September due October 30) and (October to March due April 30) 		
<p>Implement the recreation and wellness plan through the development, promotion and delivery of recreation and wellness objectives.</p>	<ul style="list-style-type: none"> - ensure programming for all genders - ensure a variety of opportunities are available – physical, artistic, cultural, educational and social - ensure programs are available for all ages - promote programs and opportunities through newsletters, posters and the school 		
<p><u>Promotion</u> Promote programs and events to the entire community.</p>	<ul style="list-style-type: none"> - develop a promotion plan to include timely posters, flyers, radio ads, bingo announcements, newsletters, house visits - implement the promotion plan for every program and event as outlined in the recreation and wellness plan 		

<u>Standards</u>	<u>Tasks</u>	<u>Assessment</u>	<u>Plan of Action</u>
<u>Training</u> Develop skills to plan and deliver effective programs by participating in available training sessions and workshops.	<ul style="list-style-type: none"> - attend recreation workshops and conferences as approved by council, ex. Recreation Connections Manitoba provincial conference in Winnipeg - attend and participate in regional meetings and groups such as Indigenous games committees and physical activity groups. 		
<u>Facilities and Equipment</u> Ensure safety precautions are followed in programming of recreation areas and facilities.	<ul style="list-style-type: none"> - provide a written report of unsafe recreation facilities/areas to council immediately on discovery - ensure proper safety equipment is used in all activities - ensure safety rules are followed during program delivery 		
Coordinate scheduling of recreation facilities and areas.	<ul style="list-style-type: none"> - develop monthly schedules for recreation facilities - ensure fair treatment of all groups and organizations when scheduling 		
Responsible for maintenance and safekeeping of all recreation equipment.	<ul style="list-style-type: none"> - maintain inventory of all recreation equipment - maintain record of recreation equipment damaged and repairs required 		
<u>Organization</u> Provide council with monthly reports.	<ul style="list-style-type: none"> - prepare monthly recreation and wellness reports - attend monthly council meetings or special meetings to discuss reports and other recreation business 		
Maintain program evaluation records.	<ul style="list-style-type: none"> - document and evaluate programs for future reference 		
Support the development of committees, as required, to assist in running various programs and events.	<ul style="list-style-type: none"> - identify the need to organize committees for specific programs or events - support these committees to ensure effective communication and successful outcomes 		
Attend community groups and club meetings as required.	<ul style="list-style-type: none"> - when requested, and at least once a year, attend meetings with various community groups to maintain communication 		
Active communication with supervisor.	<ul style="list-style-type: none"> - meet on a weekly or bi-weekly basis - meet with supervisor who will complete performance appraisal once a year 		
<u>Financial Management</u> Ensure funds received are managed effectively to deliver the recreation and wellness plan.	<ul style="list-style-type: none"> - assist with preparation of annual recreation and wellness budget - assist in fundraising activities when necessary - research and apply for grants and funding on a timely basis (before the deadlines) 		

<u>Standards</u>	<u>Tasks</u>	<u>Assessment</u>	<u>Plan of Action</u>
<p><u>Liaison</u> Be the active recreation and wellness contact of the community.</p>	<ul style="list-style-type: none"> - communicate with the department regional office on a regular basis or as required - communicate with the Health, Seniors and Active Living regional office, Municipal Relations regional office, Sport Manitoba and other stakeholders on a regular basis to keep up to date on opportunities and grant programs - promote programs and opportunities happening outside the community within the community 		
<p><u>Volunteers</u> Recruit and support community volunteers.</p>	<ul style="list-style-type: none"> - ensure orientation and training of volunteers - develop volunteer job description - identify and contact potential community volunteers - develop a volunteer recognition program - provide opportunities for volunteer development such as clinics or leadership workshops - assist volunteers in program development and delivery by accessing resources, facilities and supplies 		
<p><u>Recreation Committee</u> Consult and assist the recreation committee in the development and delivery of recreation and wellness opportunities.</p>	<ul style="list-style-type: none"> - assist committee to develop the annual recreation and wellness plan - involve committee members in the implementation of programs - attend and participate in monthly meetings to provide reports/updates and other information - provide follow-up on decisions made at recreation committee meetings 		
<p><u>Professionalism</u> Report all absenteeism to supervisor.</p>	<ul style="list-style-type: none"> - prior to _____ a.m. 		
<p>Maintain agreed upon working hours. These hours are _____ per week.</p>	<ul style="list-style-type: none"> - determine working hours with supervisor - keep record of hours worked and report to _____. 		
<p>Employer's Comments:</p>		<p>Employee's Comments:</p>	

Employer's Signature

Employee's Signature

Date: _____

Community Safety Officer Performance Appraisal Template

Employee Name: _____

Date of Review: _____

Community: _____

<u>Standards</u>	<u>Tasks</u>	<u>Assessment</u>	<u>Plan of Action</u>
<p><u>Crime Prevention</u> General crime prevention.</p>	<ul style="list-style-type: none"> - monitor suspicious behaviours with dashboard camera - establish crime prevention programming within the community - enforce community bylaws and limited enforcement abilities - check for vandalism - carry out day/night patrols as scheduled - work with school patrol/bus safety program, as may be requested - attend to family disputes, as required in limited capacity - refer matters to the local or nearest RCMP detachment, when necessary - accompany the RCMP when in community, as required 		
<p>Maintain visible presence in community .</p>	<ul style="list-style-type: none"> - visit schools, nursing stations, airports, etc. - develop rapport with children, youth, citizens - be involved with and support recreational and wellness activities - respond to emergency calls 		
<p>Liaison with other agencies.</p>	<ul style="list-style-type: none"> - maintain liaison with other agencies (ex. Probation Services, Addictions Foundation of Manitoba, Child and Family Services, etc.), as required - establish liaison with other communities adjacent First Nations and their officers 		
<p><u>Administration</u> Reporting.</p>	<ul style="list-style-type: none"> - provide council with monthly reports - provide local or nearest RCMP detachment with necessary reports - keep record of expense reports - maintain confidentiality of files, reports - submit vehicle mileage and maintenance reporting 		
<p>Deliver documents.</p>	<ul style="list-style-type: none"> - contact individuals for the RCMP and courts, as required 		
<p>Other.</p>	<ul style="list-style-type: none"> - maintain a valid Manitoba Class 5 driver’s licence - maintain job requirements 		
<p><u>Uniform and Equipment</u> Uniform and equipment.</p>	<ul style="list-style-type: none"> - wear uniform while on duty for identification - carry assigned and protective equipment, as required 		

<u>Standards</u>	<u>Tasks</u>	<u>Assessment</u>	<u>Plan of Action</u>
	<ul style="list-style-type: none"> - keep patrol vehicle in good repair and follow maintenance schedule - maintain personal equipment and keep in good condition 		
<p><u>TRAINING</u> Participate in initial and ongoing training programs to enable the community safety officer to carry out the job functions.</p>	<ul style="list-style-type: none"> - pass initial required training course - attend all necessary training courses, as required - maintain a record of all training and provide to council upon request 		
Employer's Comments:		Employee's Comments:	

 Employer's Signature

 Employee's Signature

Date: _____