### CDS Probationary Accounting Assistant

### Performance Review & Competency Assessment Form Self-Evaluation / Supervisor Evaluation

|  |  |  |  |
| --- | --- | --- | --- |
| Employee Name: |  | Position: |  |
| Rating Period: |  | Date: |  |
|  |  |

Using the review factors and definitions:

* Mark the appropriate rating for each category.
* Basis for Rating must be included for each factor rated “Needs to Improve” or “Exceeds Competency Expectations”.

|  |  |  |
| --- | --- | --- |
| **Needs to Improve** | **Meets Competency Expectations** | **Exceeds Competency Expectations** |
| Employee performance is inconsistent and fluctuates between a substandard and standard level. Critical elements of performance are occasionally below the standards required for the position as outlined in the job description. | Employee consistently performs at the level of efficiency and effectiveness for standards required for the position as outlined in the job description. This is the performance of a fully trained, qualified and motivated employee. | Employee regularly performs above the expected level. Performance is above the standards required for the position as outlined in the job description. This is performance beyond satisfactory standards, and requires additional work, which is beneficial to CDS, Inc. |

**1. PROFESSIONAL DEMEANOR**

*The ability to portray a professional image.*

1. Responds to the needs of the public, staff, contractors and vendors in a service friendly manner
2. Applies skills that demonstrate the promotion of a productive team environment

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| --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** |
|  Needs to Improve  |  Meets Competency Expectations |

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| --- |
| Basis for Rating:  |

**2. KNOWLEDGE OF JOB**

*Information obtained through experience, observation, on-the-job training and/or through verbal or written procedures or instructions.*

1. Prepares and processes Accounts Payable including Cafeteria Plan and In-Kinds.
2. Provides backup for Cash Book and deposit preparation.
3. Monitors and maintains contractual relationships with vendors and lessors
4. Monitors budgets and prepares budget modifications as necessary or requested.
5. Assists and provides backup for monthly preparation of financial reports.
6. Maintains Employee Payroll Allocation File.
7. Maintains Expense Allocation File and vendor allocation files.
8. Assist and Provides backup on Payroll.
9. Makes deposit shortly after preparation
10. Monitors payments and donations made via PayPal for processing.
11. Provides backup on Bank Reconciliation
12. Prepares correcting Journal Entries as needed for CFO review prior to General Ledger update.
13. Operate and maintain the Fixed Assets System
14. Provides backup for preparation of 5500/VALIC reporting.
15. Provides backup for grant reporting as needed.
16. Performs any and all tasks in Department when required due to vacation or illness.
17. Assist COO as requested on special project

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| --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** |
|  Needs to Improve  |  Meets Competency Expectations |

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| --- |
| Basis for Rating:   |

**3. INITIATIVE**

*The ability to display eagerness or aptitude in seeking new challenges and successfully resolve problems.*

1. Seeks out and engages in activities that assist managers and staff
2. Participates in the development of activities that will improve functionality and efficiency

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| --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** |
|  Needs to Improve  |  Meets Competency Expectations |

|  |
| --- |
| Basis for Rating:  |

1. **PLANNING & ORGANIZING & QUALITY OF WORK**

*The ability to establish and meet deadlines in an efficient and qualitative manner.*

1. Maintains fiscal records in an orderly and easily retrievable manner
2. Prepares and processes purchase order requisitions accurately and expeditiously
3. Assists with maintaining records to meet audit requirements
4. Ensures that payments to vendors, contractors, staff and participants are processed in a timely and accurate manner
5. Assist in maintenance of filing systems

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** |
|  Needs to Improve  |  Meets Competency Expectations |

|  |
| --- |
| Basis for Rating:  |

**5. COMMUNICATION**

*The ability to convey knowledge and information effectively.*

1. Maintains an effective communication with other agency staff
2. Models communication that promotes a team attitude across the agency
3. Maintains and transmits data and information in a manner that protects data integrity and ensures confidentiality
4. Communicates up the chain of command about current and potential issues of concern in a timely manner

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** |
|  Needs to Improve  |  Meets Competency Expectations |

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| --- |
| Basis for Rating:  |

**6. DECISION MAKING**

*The ability to use sound judgment and reasoning to arrive at a solution.*

1. Responds to situations in a manner that is fair and reduces conflict
2. Trouble shoots issues and problems
3. Seeks consultation and assistance as needed and appropriate

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** |
|  Needs to Improve  |  Meets Competency Expectations |

|  |
| --- |
| Basis for Rating:  |

**7. SAFETY & SECURITY**

*The ability to ensure the security of confidential information, safety of participants, co-workers and/or the general public.*

1. Ensures the security of confidential employee information
2. Ensures the security of petty cash, checks, and other monies received

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** | **6** |
|  Needs to Improve  |  Meets Competency Expectations |

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| --- |
| Basis for Rating:  |

Step 1: Enter score associated with each factor from the preceding pages.

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Factor #** | 1 | 2 | 3 | 4 | 5 | 6 | 7 | Total |
| **Score** |  |  |  |  |  |  |  |  |

Step 2: Divide Total Score by number of factors used to get review score.

 Score/             = R**eview Score**

# Factors 7

Step 3: Circle range corresponding to above score.

|  |  |
| --- | --- |
| 0 - 3.00 | Needs to Improve  |
| 3.00 - 6.00 | Meets Competency Expectations  |

**Summarize improvement plan and steps to be taken to attain competency improvement as applicable.**

|  |  |
| --- | --- |
| **Goal 1:** (Specific job function, competency, or work requirement to be addressed.) |  |
|  | Objectives/Action Steps to Meet Goal | Target Quarter |
| 1 |  |  |
| 2 |  |  |
| 3 |  |  |

|  |  |
| --- | --- |
| **Goal 2:** (Specific job function, competency, or work requirement to be addressed.) |  |
|  | Objectives/Action Steps to Meet Goal | Target Quarter |
| 1 |  |  |
| 2 |  |  |
| 3 |  |  |

|  |  |
| --- | --- |
| **Goal 3:** (Specific job function, competency, or work requirement to be addressed.) |  |
|  | Objectives/Action Steps to Meet Goal | Target Quarter |
| 1 |  |  |
| 2 |  |  |
| 3 |  |  |

**Training Plan objectives for the coming year as applicable**

|  |  |  |
| --- | --- | --- |
|  | Training Needs/Goals: (Based on Goals of the Evaluation) | Target Quarter |
| 1 |  |  |
| 2 |  |  |
| 3 |  |  |
| 4 |  |  |
| 5 |  |  |
| 6 |  |  |

|  |  |  |
| --- | --- | --- |
|  | Professional Growth/Career Goals: | Target Quarter |
| 1 |  |  |
| 2 |  |  |
| 3 |  |  |

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| --- |
| **Additional Comments:** |

**Signatures (in ink) Date**

|  |  |  |
| --- | --- | --- |
| Employee |   |   |
| Supervisor |   |   |
| Chief Operations Officer |   |   |
| Chief Executive Officer |   |   |

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| --- |
| **Employee Comments:** |