

**OFFICE MANAGER**  
**Training Needs Assessment Evaluation Form**

**Personal/Position Information**

Name: \_\_\_\_\_

Period Covered: \_\_\_\_\_

Position: \_\_\_\_\_

Reviewed by: \_\_\_\_\_

Title: \_\_\_\_\_

Position Start Date: \_\_\_\_\_

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

Region: \_\_\_\_\_

# OFFICE MANAGER

## Training Needs Assessment Evaluation Form

Major Category	Skill	Subskill
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<b>Administrative Support</b>
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<b>Perform administrative tasks</b>
Training Requested? <input type="checkbox"/>

Design and implement office policies	Establish standards and procedures	Organize office operations and procedures	Supervise office staff	Monitor and record long distance phone calls	Prepare time sheets
P <input type="checkbox"/> S <input type="checkbox"/> 4	P <input type="checkbox"/> S <input type="checkbox"/> 4	P <input type="checkbox"/> S <input type="checkbox"/> 4	P <input type="checkbox"/> S <input type="checkbox"/> 4	P <input type="checkbox"/> S <input type="checkbox"/> 3	P <input type="checkbox"/> S <input type="checkbox"/> 4

Control correspondence	Review and approve supply requisitions	Liaise with other agencies, organizations and groups	Update organizational memberships	Maintain office equipment	
P <input type="checkbox"/> S <input type="checkbox"/> 4	P <input type="checkbox"/> S <input type="checkbox"/> 4	P <input type="checkbox"/> S <input type="checkbox"/> 4	P <input type="checkbox"/> S <input type="checkbox"/> 3	P <input type="checkbox"/> S <input type="checkbox"/> 3	

<b>Supervise office staff</b>
Training Requested? <input type="checkbox"/>

Assign and monitor clerical and secretarial functions	Recruit and select office staff	Orient and train employees	Provide on the job and other training opportunities	Supervise staff	Evaluate staff performance
P <input type="checkbox"/> S <input type="checkbox"/> 5	P <input type="checkbox"/> S <input type="checkbox"/> 4	P <input type="checkbox"/> S <input type="checkbox"/> 4	P <input type="checkbox"/> S <input type="checkbox"/> 4	P <input type="checkbox"/> S <input type="checkbox"/> 5	P <input type="checkbox"/> S <input type="checkbox"/> 4

Coaching and disciplining staff					
P <input type="checkbox"/> S <input type="checkbox"/> 4					

# OFFICE MANAGER

## Training Needs Assessment Evaluation Form

Major Category	Skill	Subskill																							
<b>Administrative Support cont'd</b>	Maintain office records	Design filing systems	Ensure filing systems are maintained and up to date	Define procedures for record retention	Ensure protection and security of files and records	Ensure effective transfer of files and records	Transfer and dispose records according to retention schedules and policies																		
	Training Requested?	P		S	4	P		S	5	P		S	3	P		S	4	P		S	4	P		S	4
		Ensure personnel files are up to date and secure																							
		P		S	4																				
	Maintain office efficiency	Plan and implement office systems, layout and equipment procurement	Maintain and replenish inventory	Check stock to determine inventory levels	Anticipate needed supplies	Verify receipt of supply																			
	Training Requested?	P		S	4	P		S	3	P		S	3	P		S	3	P		S	3				
<b>Technical Skills</b>	<b>Possess computer skills</b>	Use word processing software programs	Use spreadsheet software programs	Use database software programs	Use utility software programs	Operate e-mail and Internet	Operate the computerized maintenance management system																		
	Training Requested?	P		S	5	P		S	5	P		S	4	P		S	4	P		S	5	P		S	4

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Major Category	Skill	Subskill								
<b>Technical Skills</b>	<b>Practice technical skills</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%;">Ability to cope with noisy equipment</td> <td style="width: 25%;">Ability to read manuals and instructions</td> <td style="width: 25%;"></td> <td style="width: 25%;"></td> </tr> <tr> <td>P <input type="checkbox"/> S <input type="checkbox"/> 3</td> <td>P <input type="checkbox"/> S <input type="checkbox"/> 5</td> <td></td> <td></td> </tr> </table>	Ability to cope with noisy equipment	Ability to read manuals and instructions			P <input type="checkbox"/> S <input type="checkbox"/> 3	P <input type="checkbox"/> S <input type="checkbox"/> 5		
	Ability to cope with noisy equipment	Ability to read manuals and instructions								
P <input type="checkbox"/> S <input type="checkbox"/> 3	P <input type="checkbox"/> S <input type="checkbox"/> 5									
Training Requested? <input type="checkbox"/>										
<b>Human Resource Management</b>	<b>Work in a team environment</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%;">Work cooperatively with others</td> <td style="width: 25%;">Oversee casual employees</td> <td style="width: 25%;"></td> <td style="width: 25%;"></td> </tr> <tr> <td>P <input type="checkbox"/> S <input type="checkbox"/> 5</td> <td>P <input type="checkbox"/> S <input type="checkbox"/> 4</td> <td></td> <td></td> </tr> </table>	Work cooperatively with others	Oversee casual employees			P <input type="checkbox"/> S <input type="checkbox"/> 5	P <input type="checkbox"/> S <input type="checkbox"/> 4		
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P <input type="checkbox"/> S <input type="checkbox"/> 5	P <input type="checkbox"/> S <input type="checkbox"/> 4									
Training Requested? <input type="checkbox"/>										
<b>Communication</b>	<b>Use effective communication</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%;">Read and comprehend business documents</td> <td style="width: 25%;">Write clearly and concisely</td> <td style="width: 25%;">Practice listening skills</td> <td style="width: 25%;">Speak effectively</td> </tr> <tr> <td>P <input type="checkbox"/> S <input type="checkbox"/> 4</td> <td>P <input type="checkbox"/> S <input type="checkbox"/> 4</td> <td>P <input type="checkbox"/> S <input type="checkbox"/> 5</td> <td>P <input type="checkbox"/> S <input type="checkbox"/> 4</td> </tr> </table>	Read and comprehend business documents	Write clearly and concisely	Practice listening skills	Speak effectively	P <input type="checkbox"/> S <input type="checkbox"/> 4	P <input type="checkbox"/> S <input type="checkbox"/> 4	P <input type="checkbox"/> S <input type="checkbox"/> 5	P <input type="checkbox"/> S <input type="checkbox"/> 4
	Read and comprehend business documents	Write clearly and concisely	Practice listening skills	Speak effectively						
P <input type="checkbox"/> S <input type="checkbox"/> 4	P <input type="checkbox"/> S <input type="checkbox"/> 4	P <input type="checkbox"/> S <input type="checkbox"/> 5	P <input type="checkbox"/> S <input type="checkbox"/> 4							
Training Requested? <input type="checkbox"/>										
<b>Communication</b>	<b>Maintain public relations</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%;">Maintain customer service</td> <td style="width: 25%;">Assist with community events</td> <td style="width: 25%;">Liaise with community organizations and agencies</td> <td style="width: 25%;"></td> </tr> <tr> <td>P <input type="checkbox"/> S <input type="checkbox"/> 4</td> <td>P <input type="checkbox"/> S <input type="checkbox"/> 3</td> <td>P <input type="checkbox"/> S <input type="checkbox"/> 3</td> <td></td> </tr> </table>	Maintain customer service	Assist with community events	Liaise with community organizations and agencies		P <input type="checkbox"/> S <input type="checkbox"/> 4	P <input type="checkbox"/> S <input type="checkbox"/> 3	P <input type="checkbox"/> S <input type="checkbox"/> 3	
	Maintain customer service	Assist with community events	Liaise with community organizations and agencies							
P <input type="checkbox"/> S <input type="checkbox"/> 4	P <input type="checkbox"/> S <input type="checkbox"/> 3	P <input type="checkbox"/> S <input type="checkbox"/> 3								
Training Requested? <input type="checkbox"/>										
<b>Legislation</b>	<b>Comply with policies and regulations</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%;">Comply with council resolutions and policies</td> <td style="width: 25%;"></td> <td style="width: 25%;"></td> <td style="width: 25%;"></td> </tr> <tr> <td>P <input type="checkbox"/> S <input type="checkbox"/> 5</td> <td></td> <td></td> <td></td> </tr> </table>	Comply with council resolutions and policies				P <input type="checkbox"/> S <input type="checkbox"/> 5			
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P <input type="checkbox"/> S <input type="checkbox"/> 5										
Training Requested? <input type="checkbox"/>										

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Major Category	Skill	Subskill	Subskill	Subskill	Subskill	Subskill	
Professionalism	Demonstrate work habits <span style="float: right;">good</span>	Manage stress	Take direction	Motivate self	Demonstrate dependability and accountability	Maintain confidentiality	Make decisions
		P <input type="checkbox"/> S <input type="checkbox"/> 4 <input type="checkbox"/>	P <input type="checkbox"/> S <input type="checkbox"/> 4 <input type="checkbox"/>	P <input type="checkbox"/> S <input type="checkbox"/> 4 <input type="checkbox"/>	P <input type="checkbox"/> S <input type="checkbox"/> 4 <input type="checkbox"/>	P <input type="checkbox"/> S <input type="checkbox"/> 4 <input type="checkbox"/>	P <input type="checkbox"/> S <input type="checkbox"/> 4 <input type="checkbox"/>
		Training Requested? <input type="checkbox"/>					
		Manage time	Demonstrate willingness to perform alternate duties as required	Demonstrate punctuality	Demonstrate flexibility	Demonstrate organizational abilities	Work with minimal supervision
		P <input type="checkbox"/> S <input type="checkbox"/> 4 <input type="checkbox"/>	P <input type="checkbox"/> S <input type="checkbox"/> 4 <input type="checkbox"/>	P <input type="checkbox"/> S <input type="checkbox"/> 4 <input type="checkbox"/>	P <input type="checkbox"/> S <input type="checkbox"/> 4 <input type="checkbox"/>	P <input type="checkbox"/> S <input type="checkbox"/> 4 <input type="checkbox"/>	P <input type="checkbox"/> S <input type="checkbox"/> 4 <input type="checkbox"/>
		Deadlines	Employ analytical skills	Demonstrate responsibility	Be a team player		
		P <input type="checkbox"/> S <input type="checkbox"/> 4 <input type="checkbox"/>	P <input type="checkbox"/> S <input type="checkbox"/> 4 <input type="checkbox"/>	P <input type="checkbox"/> S <input type="checkbox"/> 4 <input type="checkbox"/>	P <input type="checkbox"/> S <input type="checkbox"/> 4 <input type="checkbox"/>		

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**Comments:**

1. Supervisor's comments

2. Expectations for the coming year/workplan

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3. Employee goals and objectives

4. Career Goals

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5. Recommended training

6. Employee Comments

Employee:	Supervisor:
Title:	Title:
Signature:	Signature:
Date:	Date: