

**Fiscal Assistant**  
**PROGRAM: UMATILLA-MORROW COUNTY HEAD START, INC.**

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

1. UNACCEPTABLE	2. MARGINAL	3. COMPETENT	4. COMMENDABLE	5. DISTINGUISHED
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**A. General Staff Responsibilities:**

1. Participate in staff meetings, conferences, training sessions and workshops as assigned ..... 1 2 3 4 5
2. Demonstrate familiarity with employment policies, performance standards, work plan and objectives of Agency ..... 1 2 3 4 5
3. Maintain congenial and respectful relations with staff, children, families and community ..... 1 2 3 4 5
4. \*Keep current and accurate records that conform to program policies ..... 1 2 3 4 5
5. \*Maintain confidentiality in regards to staff and family information ..... 1 2 3 4 5
6. Maintain objectives and professional standards ..... 1 2 3 4 5
7. Improve self-skills and education ..... 1 2 3 4 5
8. \*Fulfill role as mandated reporter as stated in Child Abuse and Neglect Policy ..... 1 2 3 4 5
9. Perform any other work-related duties as requested by your supervisor ..... 1 2 3 4 5
10. Be a contributory team member in a positive/productive manner ..... 1 2 3 4 5
11. \*Demonstrate commitment to mission, values, and policies in the performance of daily duties ..... 1 2 3 4 5

\*Comments or examples:

**B. Office/Bookkeeping Duties:**

1. Types, reproduces, and distributes written materials promptly ..... 1 2 3 4 5
2. Files promptly and maintains accurate filing system ..... 1 2 3 4 5
3. Keeps office area clean and neat, free of clutter ..... 1 2 3 4 5
4. \*Enter accounts payable onto computer accurately and in a timely manner ..... 1 2 3 4 5
5. Keep up-to-date on verifying the purchase orders and billings ..... 1 2 3 4 5
6. \*Contacts vendors as necessary to ensure prompt and accurate payments ..... 1 2 3 4 5
7. \*Prepare payroll, assist with the payroll taxes and payroll reports ..... 1 2 3 4 5

\*Comments or examples:

**C. Receipts and Invoices:**

1. \*Reviews receipts for appropriateness ..... 1 2 3 4 5
2. Prepares invoices as needed ..... 1 2 3 4 5

\*Comments or examples:

**D. Computer Entry:**

1. Inputs incoming database information in a timely manner ..... 1 2 3 4 5
2. Assures accuracy of data input ..... 1 2 3 4 5

\*Comments or examples:

**E. Staff Communication and Team Membership:**

- 1. Shares materials and information ..... 1 2 3 4 5
- 2. \*Uses appropriate channels for concerns and does not interfere in a situation another staff person is handling ..... 1 2 3 4 5
- 3. \*Supports team members and supervisor verbally and by attitude ..... 1 2 3 4 5
- 4. Sets aside sufficient time to meet and plan with team members ..... 1 2 3 4 5

\*Comments or examples:

**F. Work Ethics:**

- 1. \*Comes to work on time ..... 1 2 3
- 2. Notifies supervisor prior to beginning of work day when not able to come to work ..... 1 2 3
- 3. \*Misses little time because of illness ..... 1 2 3
- 4. Willingly accepts changes in program ..... 1 2 3
- 5. Accepts and acts on constructive criticism ..... 1 2 3
- 6. Follows through on accepted tasks or agreements ..... 1 2 3

\*Comments or examples:

Do you have long-term employment goals? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

What help do you need to accomplish these goals? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Additional Information: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Supervisor's Signature \_\_\_\_\_ Date \_\_\_\_\_

Fiscal Assistant's Signature \_\_\_\_\_ Date \_\_\_\_\_

### Rating Scale Explanation:

1. **UNACCEPTABLE** - Performance falls substantially short of the expectations for competency. Requires much improvement.
2. **MARGINAL** - Performance does not meet an acceptable level in all areas, but employee is steadily improving.
3. **COMPETENT** - Performance is fully acceptable. Performance meets standards set for the position on a consistent basis.
4. **COMMENDABLE** - Performance is significantly better than average. Consistently exceeds standards; distinctive performance.
5. **DISTINGUISHED** - Exceptional performance of unusually high caliber. Remarkable achievement and pacesetting performance.

Any task marked 1, 2, or 5 must have a comment written to justify the score.

Any task marked 1 or 2 must have a plan of assistance written and be attached to the performance evaluation.

Any \* task (essential job function) marked a 1 or 2, no merit increase will occur until the task is brought up to competency.

Three tasks marked a 1 or 2, no merit increase will occur until the task is brought up to competency.

- Successful completion of a 6 month introductory period**
- Eligible for merit increase**
- Not eligible for merit increase**