

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. *Do the USDA Day care Homes Provider's reimbursement checks promptly and accurately 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. USDA Center Activities:

1. *Reviews shopping lists and cash register receipts 1 2 3 4 5
2. Complete USDA meal check request by last week of the month 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 _____

Accounting 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**