

EVALUATION/TRAINING DOCUMENT

The Urban Board of Examiners requires this document to be accompany an application Standard Certificate where the applicant is claiming experience credit pursuant to Schedule "A", Table 1, Category 1 (on-the-job training). In addition to this document, the mentor **must submit** a written report.

A person meeting the following minimum qualifications may sign the Training Document:

- holder of an Advanced Certificate – Level 1 or 2, or equivalent; or
- holder of a Standard Certificate or equivalent for a period of not less than 5 years
- holder of a Rural "A" Certificate or equivalent for a period of not less than 5 years.

The Competency Profile Chart is attached to provide guidance to the person signing the Training Document. The chart may be returned with the Training Document to provide the Board with additional information.

Training Document

Categories:

1. Interpret and apply legislation
2. Keep accounting records
3. Secure and manage financial resources
4. Collect revenues and control expenditures
5. Work with elected officials
6. Perform office functions
7. Manage human resources
8. Deal with public

Mentor Endorsement of Competency

By signing the Competency Profile and Training Document, the mentor affirms that they have supervised and trained the candidate in all required areas of the competency profile. The mentor attests that they have personally reviewed and checked each area of the competency checklist and can confirm that the candidate has been adequately trained. This endorsement confirms that, in the mentor's professional judgment, the candidate is prepared to assume the responsibilities of a municipal administrator and is capable of successfully completing an office inspection. The mentor acknowledges that their signature carries professional responsibility and reflects their confidence in the candidate's readiness to hold a Standard Certificate.

Mentorship Reporting

Mentors must submit a final written report to the UMAAS Board of Examiners at the conclusion of the mentorship period confirming the applicant's completion of the required 1,800 hours, demonstrated competency in municipal administration practices, and the mentor's professional recommendation regarding readiness for certification. The Board of Examiners may request additional information or clarification prior to approval.

PLEASE PRINT or TYPE

I, _____, Administrator of the _____ of _____ in the Province of Saskatchewan, do solemnly declare:

1. That I hold the following certificate of qualification:

Class _____

Date of Issue _____

2. That I have adequately trained _____ in the above mentioned categories and it is my belief that he/she now possesses a competent level of knowledge in those areas to competently and proficiently able to perform the duties of an urban administrator.

Dated this _____ day of _____

Signature

COMPETENCY PROFILE CHART

Interpret and Apply Legislation

- Interpret statutes and other legislation and regulations
- Keep current with applicable legislation and regulations
- Keep legislation and regulations references up to date
- Draft bylaws and resolutions
- Administer regulations and bylaws
- Utilize common law and statutes
- Utilize contract law
- Interpret Election Act
- Apply election procedures
- Implement Community Planning and Development Act
- Deal with Land Titles Office

Secure and Manage Financial Resources

- Forecast revenues and expenditures
- Determine availability of grants
- Prepare budgets
- Manage property
- Do banking
- Control inventory
- Identify insurance needs
- Analyze monthly financial statements
- Exercise internal control

Collect Revenues and Control Expenditures

- Collect taxes
- Calculate discounts, rebates and penalties
- Sell licenses and permits
- Collect rents, fines and other fees

Keep Accounting Records

- Estimate preliminary assessment values
- Prepare assessment roll
- Get local improvement tax on roll
- Prepare tax roll
- Issue receipts
- Issue cheques
- Enter data into books of original entry
- Post general ledger
- Prepare monthly financial statement
- Prepare abatement and cancellation documents
- Close and balance books at year end
- Prepare liability statements
- Prepare annual financial statements
- Tax/Utility Balance to GL
- Reconcile annual TCA Listing

Collect Revenues and Control Expenditures, etc

- Issue and collect utility billings
- Apply for grants
- Collect grants in lieu of taxes
- Collect trailer license fees
- Sell and collect for services and supplies
- Apply for excise tax rebates
- Enforce tax collection procedures
- Deal with Provincial Mediation Board
- Collect tax through title acquisition
- Prioritize expenditures
- Specify expenditures
- Determine cash flow
- Verify invoices
- Do payroll accounting
- Perform cost analysis

COMPETENCY PROFILE CHART

Work with Elected Officials

- Call Council or Board meetings
- Prepare agenda for meetings
- Gather information for meetings
- Serve as a secretary for Council or Board
- Take minutes at meetings
- Present reports at meetings
- Introduce delegates at meetings
- Advise on rules of order
- Advise Council or Board
- Distribute minutes
- Implement Council / Board decisions
- Administer policies
- Liaise with other governmental jurisdictions

Perform Office Functions

- Set up office procedures
- Write business correspondence
- Keep written records
- Set out and maintain filing system
- Maintain and destroy records
- Operate standard office equipment
- Handle mail
- Order supplies
- Make effective use of computer systems
- Read maps
- Interpret blueprints, designs and plans
- Deal with vendors

Manage Human Resources

- Draft job description
- Advertise jobs
- Arrange for bonding
- Delegate to employees
- Administer employee benefit plans
- Process worker compensation forms
- Prepare employee separation certificates and termination letters

Deal with Public

- Demonstrate human relation skills
- Demonstrate communication skills
- Explain Council / Board decisions
- Handle complaints
- Deal with inquiries
- Make referrals
- Explain individual's assessments and taxes
- Consult with people
- Assist public in filling out forms

I certify the above competency profile to be true in all respects

| | |
|-----------------------|--|
| Signature (Mentor) | |
| Date | |