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| Quaestor Skills Assessment | |
| Purpose:  This assessment is designed to help Quaestors determine which financial skills they may need to develop. It focuses on 4 components, including (1) technical skills, (2) human skills, (3) conceptual skills, and (4) leadership. A set of 5 statements reflects various attributes of and skills for each component.  **Instructions:**  Please read each statement carefully on the following page. Then rate yourself (or rate the Quaestor-elect if you are performing this assessment as the outgoing Quaestor) in terms of how well you think you possess the attribute or perform the skill by circling the statement and its corresponding number that best reflects your view. This is not a test – there are no right or wrong answers.  The rating scale provides three choices:  1 = I do not possess this attribute or do this skill well at all.  2 = I seldom possess this attribute or do this skill somewhat well.  3 = I possess this attribute or do this skill very well.  Circle your chosen response for each statement. Please respond to every statement. In selecting your response, be realistic about your assessment. Do not answer in terms of how you would like to see yourself, in terms of what you should be doing, or in terms of how you think others view you. Again, the purpose of this assessment is to help you focus on growth objectives that will stretch you in meaningful ways. |

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| **Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** | **Do not do well** | | **Do somewhat well** | **Do well** |
| **Technical Skills** | | | | |
| **I am able to keep timely and accurate financial records.** | **1** | | **2** | **3** |
| **I am able to create and maintain a functional budget.** | **1** | | **2** | **3** |
| **I am able to maintain accurate member accounts/balances.** | **1** | | **2** | **3** |
| **I fulfill financial obligations in a timely manner.** | **1** | | **2** | **3** |
| **I can read and understand basic financial reports.** | **1** | | **2** | **3** |
| **Total Score of items circled divided by 5. The resulting number is your average score for this area.** |  | |  |  |
|  | **Do not do well** | | **Do somewhat well** | **Do well** |
| **Human Skills** | | | | |
| **I successfully manage personal and professional relationships.** | **1** | **2** | | **3** |
| **My social, emotional and situational awareness allows me to appropriately assess my environment and the people in it.** | **1** | **2** | | **3** |
| **I communicate effectively with my peers and coworkers.** | **1** | **2** | | **3** |
| **I present information efficiently and effectively in large and small group settings.** | **1** | **2** | | **3** |
| **I am trustworthy with others’ personal information.** | **1** | **2** | | **3** |
| **Total Score of items circled divided by 5. The resulting number is your average score for this area.** |  |  | |  |
|  | **Do not do well** | **Do somewhat well** | | **Do well** |
| **Conceptual Skills** | | | | |
| **I understand the vision, mission and fundamental purpose of Sigma Chi and incorporate them in my decision making.** | **1** | | **2** | **3** |
| **I practice effective time-management/organizational skills.** | **1** | | **2** | **3** |
| **I am able to forecast and plan for future goals and outcomes, particularly in relation to financial goals and outcomes.** | **1** | | **2** | **3** |
| **I excel at following procedures and have the foresight to see upcoming changes and modify procedures accordingly.** | **1** | | **2** | **3** |
| **I can combine my conceptual and human skills to maximize my effectiveness in training others.** | **1** | | **2** | **3** |
| **Total Score of items circled divided by 5. The resulting number is your average score for this area.** |  | |  |  |
|  | **Do not do well** | | **Do somewhat well** | **Do well** |
| **Leadership Skills** | | | | |
| **I understand my values and exemplify them daily.** | **1** | | **2** | **3** |
| **I can articulate Sigma Chi’s vision, mission and purpose.** | **1** | | **2** | **3** |
| **I accept the ethical responsibilities that come with leadership.** | **1** | | **2** | **3** |
| **I challenge others to live by our/their standards and values.** | **1** | | **2** | **3** |
| **I maintain accountability while also rewarding performance.** | **1** | | **2** | **3** |
| **Total Score of items circled divided by 5. The resulting number is your average score for this area.** |  | |  |  |

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| Assessment Instructions | |
| **Calculation:**  Add up the scores for each section and divide by 5. This will provide an overall score for each section. Once you have calculated the scores for each section, select the lowest scoring sections to begin seeking resources and mentorship. Follow with the other sections, progressing towards the highest score.  **Discussion:**  Begin the process of development by having a discussion on each section. If you are the outgoing Quaestor or Financial Committee member performing the assessment, sit and discuss each section in detail and provide explanations for your individual scores. Allow the new Quaestor to provide feedback and be open to his personal assessment. Remember, this is a positive exercise designed to assist in personal development. Be willing to collaborate and find a mutually agreed upon plan to improve the new Quaestor’s operational and leadership skills.  If self-performing this assessment at the new Quaestor, use the assessment results to begin a conversation with the outgoing Quaestor, Financial Committee member/members, Chapter Advisor, or a trusted mentor to begin the process of personal development.  The desired result in either situation is to develop a timely strategic plan to develop or increase your abilities in each section of the assessment.  **Skill Development:**  Utilize the Quaestor Skill Development Worksheet to create a strategic plan for each item or section. Create a goal or “Why” statement and then develop a plan with communication channels with mentors/trainers, action steps and resources to grow your knowledge, and ways to anchor these new skills into your daily practice. |