



# Annual Goal Setting

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## Appendix 1

CAO – Annual Performance Review Process

(To Be Completed by Chief Administrative Officer & Council)

Goals will be SMART:

**Specific** – Goal objectives should address the five Ws.....who, what, when, where and why. Goals need to be specific what needs to be done with a set timeframe for completion.

**Measurable** – Goal objectives should contain clear criteria for determining if the employee achieved the goal. Goal objectives should include numeric or descriptive measures that identify quantity, quality, cost, etc. Ideally, this measuring system should allow the employee to be able to monitor his/her progress along the way.

**Achievable** – Since goals can and should serve as motivational tools, they should state a target that is within reach, yet not too easy to accomplish.

**Relevant** – Goals should be instrumental to the mission of the organizational agenda. Why is the goal important ? How will the goal help the organization achieve its objectives

**Timebound** – Goal objectives should identify a target date for completion and/or frequencies for specific action steps that are important for achieving the goal.

### Performance Objectives

**Objective 1:** End of Year Comments (Chief Administrative Officer)

End of Year Comments (Town Council)

**Objective 2:**

End of Year Comments (Chief Administrative Officer)

End of Year Comments (Town Council)

**Objective 3:**

End of Year Comments (Chief Administrative Officer)

End of Year Comments (Town Council)

**Objective 4:**

End of Year Comments (Chief Administrative Officer)

End of Year Comments (Town Council)

**Objective 5:**

End of Year Comments (Chief Administrative Officer)

End of Year Comments (Town Council)

**Summary Ratings**

Exceeded all Objectives	Met ALL <i>and</i> Exceeded Most Objectives	Met All Objectives	Met Some Objectives	Did Not Meet Objectives



# Mid-Year Check-in

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## Appendix 2

CAO – Annual Performance Review Process

(To be completed by CAO & Council)

### Mid-Year Check-In

Performance Objective Comments

(For example, any changes to objectives.)

Objectives 1-5 (list from Annual Goal Setting Appendix 1):

Mid-Year Comments (Chief Administrative Officer)

Mid-Year Comments (Town Council)

DRAFT



# CAO Annual Self-Assessment

## Appendix 3

### CAO – Annual Performance Review Process

(to be completed by the CAO)

#### Instructions

In this section, provide concrete examples of situations where expectations were met or exceeded or where improvement is needed. Where improvement is required, there should be details and examples in the comments section, and where performance has been exceptional, this should also be acknowledged with comments and specific examples.

Definitions:

Rating	Description
Exceeds Expectations	Substantially and consistently exceeds established standards and expectations. Constantly makes an observable and measurable contribution to the Town. Would be very difficult to improve on the employee's performance.
Frequently Exceeds Expectations	More than "doing a good job"; fully engaged in performance and achievement of standards and expectations. Displays a high level of competence and superior performance above standards and expectations.
Meets Expectations	Most people meet expectations most of the time. This implies that they are performing as expected for their role(s), level of skill, and experience. Employee is competent and qualified in the position.
Below Expectations	Performance sometimes meets established standards and expectations, but not on a consistent basis; or some skills meet expectations but others need some improvement (rating may be

Rating	Description
	reasonable at a probationary review). Plans should be outlined (see below) to help the individual improve the consistency of their performance or sharpen specific skills.
Needs Significant Improvement	Performance is consistently below established standards and expectations. Frequent and ongoing direction is required. Specific plans, with targets and timelines, should be outlined in a Performance Improvement Plan to help the individual improve.

## 1. Interpersonal Effectiveness

### Communication & Interaction

- Demonstrates the ability to listen and respond in a manner that ensures effective interactions and facilitates understanding.
- Encourages full expression of ideas, opinions and concerns
- Able to deliver difficult messages effectively and diffuse high tension situations with skill.
- Builds trust through presenting ideas clearly and effectively listening to others, even when not in agreement.
- Able to effectively engage the media when call upon to do so.

### Teamwork & Co-operation:

- Effectively gains the trust and support of others and skillfully negotiates win/win outcomes.
- Respects team decisions while having the ability to challenge others on the team to “think outside the box”.
- Demonstrates the ability to harmonize and foster appreciation of different thinking, working and problem solving styles.
- Identifies and fosters strategic alliances and partnerships.

### Influencing Others

- Effectively communicates organizational strategies so they are well understood and staff is motivated and engaged in achieving them.
- Ability to positively influence others through communication and interaction skills and to effectively get ideas and information across to others.
- Provides visible and effective support and leadership of corporate initiatives.

**Comments/Examples:**

Expectation Rating	Exceeds All	Frequently Exceeds all	Meets All Expectations	Below Expectations	Needs Significant Improvement
Communication					
Teamwork And Cooperation					
Influencing Others					

**2. Knowledgeable****Business & Political Acumen:**

- Understands the key business priorities of the organization
- Provides sound, unbiased advice, recommendations and guidance to the Mayor and Council on the full range of municipal activities.
- Establishes an interactive and integrated strategic planning process with all stakeholders, based on accurate readings of the environment, customer wants and needs.
- Able to assess results, predict problems and roadblocks, adjust schedules, tasks, people and priorities appropriately.
- Able to build and act on customer/community needs, problems, opportunities and possibilities.
- Creates a customer focused culture, ensuring business strategy is linked to creating value for customers
- Maintains trust and confidence of elected officials and the public.
- Anticipates the possible impacts of decisions in the political context.

**Conceptual & Analytical Thinking:**

- Demonstrates the ability to gather needed information, assesses results and forecast needed resources.
- Cuts through complexities to identify critical issues.

**Decision Making:**

- Analyses all factors involved to reach a sound conclusion
- Helps team members evaluate alternatives to reach a realistic solution
- Makes sound recommendations

**Comments/Examples:**

Expectation Rating	Exceeds All	Frequently Exceeds all	Meets All Expectations	Below Expectations	Needs Significant Improvement
Business & Political Acumen					
Conceptual & Analytical Thinking					
Decision Making					

**3. Performance Oriented****Achievement/Goal Oriented:**

- Correctly scopes out length and difficulty of projects/work, sets goals and objectives accordingly and attends to a broad range of activities at the same time.
- Demonstrates the ability to create plans/programs that support the Town's corporate vision.
- Produces high quality results
- Delivers on commitments

**Personal Effectiveness:**

- Knows what needs to be done by oneself and when to seek help or resources from others
- Demonstrates ability to trust others to perform by delegating both routine and non-routine work and decisions.
- Shares both accountability and responsibility with others.
- Maintains a high degree of personal integrity and commitment.

**Flexibility:**

- Analyses organization issues and challenges to be addressed by changes and incorporates new requirements into role.
- Looks for creative solutions that support a culture of continuous improvement and innovation.
- Maintains an open mind to new and different ways of thinking and working
- Appreciates different and opposing views
- Maintains composure and a positive attitude when under stress and pressure
- Comments/Examples

Expectation Rating	Exceeds All	Frequently Exceeds all	Meets All Expectations	Below Expectations	Needs Significant Improvement
Achievement/Goal Oriented					
Personal Effectiveness					
Flexibility					

**4.Engaged****Committed to Organizational Goals:**

- Aligns behaviour with corporate values, principles, and goals
- Makes choices and sets priorities in alignment with the strategic direction of The Town.
- Demonstrates initiative when a problem exists and offers solutions.

**Leadership**

- Creates and nurtures a culture that attracts, retains and motivates talented people who achieve results through support and collaborative expertise.
- Ability to develop a collective vision amongst employees.
- Fosters an environment of empowerment at all levels in the organization
- Viewed as a change leader; identifies and successfully pursues opportunities that add value

- Challenges others to achieve beyond their expectations and values the contributions of others.
- Able to clearly communicate the strategy of a change process and to create plans, structures and resources to support the change initiative.
- Provides quality feedback and coaching on a regular and timely basis
- Demonstrates and takes a leadership role to ensure the health, wellness and safety of the work environment

Comments/Examples:

Expectation Rating	Exceeds All	Frequently Exceeds all	Meets All Expectations	Below Expectations	Needs Significant Improvement
Committed to Organizational Goals					
Leadership					

## 5. Overall Performance of the Town

### Internal Indicators:

- Prudent and strategic financial plans and decisions are demonstrated.
- Proactive method in dealing with changes and growth within the Town.
- Successful coordination and assistance in communicating Council priorities to the organization.
- Meeting or exceeding established budget targets.
- Demonstrable progress on Council’s Strategic Priorities

### External Indicators

- Public input is proactively gathered on the performance of the Town.
- The “development community” understands the Town’s guidelines and requirements.
- Supports & encourages initiatives that improve the real and perceived safety of the community.
- Public concerns are addressed appropriately and in a timely manner.
- Demonstrates collaborative & positive relationships with other municipalities on a provincial scope.
- Leadership and active participation in support of regional initiatives and programs.

Expectation Rating	Exceeds All	Frequently Exceeds all	Meets All Expectations	Below Expectations	Needs Significant Improvement
Internal Indicators					
External Indicators					

**Achievement of Goals :**

Goals	Results achieved (Y/N)	Comments
1		
2		
3		
4		
5		

Overall comments on what affected my performance this year (either positively or negatively):



# CAO Annual Performance Appraisal

## Appendix 4

CAO – Annual Performance Review Process

(to be completed by Council)

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## 2. Knowledgeable

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### Conceptual & Analytical Thinking:

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### Decision Making:

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**Comments/Examples:**

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Comments/Examples

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5		

Areas of strength that is identified in the CAO:

Areas where growth is required: