

APPENDIX 1

SAMPLE FORMAT: CAO PERFORMANCE EVALUATION

Instructions: *Rating from 0-4:*

- 0 – Don't know
- 1 – Falls short of requirements
- 2 – Meets requirements
- 3 – Performing beyond requirements
- 4 - Exceptional

Rate each of the following according to your perception of the performance of the CAO in the past year.
Please provide comments or examples to illustrate the rating.

MANAGEMENT AND LEADERSHIP EFFECTIVENESS

1. Leadership style fits the Municipality's needs. Rating ____
- _____

1. Obtains and allocates resources consistent with strategic objectives. Rating ____
- _____

2. Demonstrates a good understanding of the major issues facing the Council and the Municipality. Rating ____
- _____

3. Exercises good judgment in dealing with major issues. Rating ____
- _____

4. Demonstrates consistent values of high ethical awareness, honesty, fairness and courage. Rating ____
- _____

5. Demonstrates a clear understanding of the local, regional, provincial and national and global issues impacting the Municipality. Rating ____
- _____

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6. Provides positive leadership to staff and elected officials. Rating ____

7. Identifies, assesses and manages the principal risks to the Municipality. Rating ____

RELATIONSHIP WITH COUNCIL

1. Presents matters to Council within appropriate timelines. Rating ____

2. Acts on Council's resolutions/motions and direction in a timely manner. Rating ____

3. Facilitates Council's governance, decision-making and committee work. Rating ____

4. Facilitates the orientation and training of Councillors. Rating ____

5. Keeps Council fully informed on all important aspects of the status and development of the Municipality. Rating ____

6. Respects the division of authority between Council and the CAO. Rating ____

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7. Maintains a positive working relationship with the Mayor and Councillors.

Rating ____

RELATIONSHIP WITH STAFF

2. Actively supports and encourages professional development among the staff.

Rating ____

3. Effectively attracts, retains, motivates and leads a team capable of achieving municipal objectives.

Rating ____

4. Ensures staff succession, including long-term development of candidates for the CAO position.

Rating ____

5. Promotes a clear understanding of roles between staff and elected officials.

Rating ____

6. Ensures an effective participative process of strategic planning to achieve the vision and mission such that Council and employees feel ownership of the final product.

Rating ____

7. Ensures staff are involved in a meaningful way with decision making.

Rating ____

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8. Effectively communicates Council's decisions to staff. Rating ____

RELATIONSHIP WITH THE PUBLIC AND MEDIA

1. Serves as chief administrative spokesperson, communicating effectively with all stakeholders.

Rating ____

2. Appropriately represents Council's direction.

Rating ____

3. Appropriately represents the Municipality and Council in the community.

Rating ____

4. Appropriately represents the Municipality and Council outside of the community.

Rating ____

5. Ensure that the public perceive the Council and the Municipality in a positive light.

Rating ____

6. Ensure that the Municipality maintains appropriate public engagement.

Rating ____

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OBJECTIVES AND ACCOMPLISHMENTS

1. Leads the operations of the Municipality and communicates a clear plan that reflects Council's vision, mission and strategic plan, and that is well understood, widely supported, consistently applied and effectively implemented. Rating _____

2. Establishes objectives, operating, and financial plans for the Municipality that meet the needs of the public, employees, and the broader community in accordance with legislation and Council policy. Rating _____

3. Continuously monitors and evaluates objectives and plans to ensure they are being achieved and takes action as needed. Rating _____

4. Ensures the Municipality meets or exceeds the financial and operating performance goals as set out in the annual plans. Rating _____

5. Reviews and where appropriate, adjusts the long term strategies and objectives of the Municipality in consultation with Council. Rating _____

6. Effectively manages both the short and long term growth of the Municipality in a manner consistent with the strategic direction adopted by Council. Rating _____

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OBJECTIVES: (These should be developed by the CAO and reviewed by Mayor and Council.)

Key Objectives

Results

| | |
|--|--|
| | |
|--|--|

Overall impression of performance and results achieved.

COMMENTS:

1. What are the CAO's greatest strengths?

2. What are the things that you have most appreciated that the CAO has accomplished so far this year?

3. What are specific areas where the CAO needs to turn his/her attention in the coming year?

4. Are there any specific training opportunities that the CAO should be utilizing?

Signature of CAO (this indicates only that this appraisal has been discussed with you, not that you agree with the ratings).

Mayor or Deputy Mayor

CAO

Date: _____

Date: _____