

Canadian Association of Municipal Administrators (CAMA)

16 Competencies for Evaluation

1. Staff Effectiveness
 - Promotes the development and performance of staff and employees throughout the organizations
2. Policy Facilitation
 - Helps elected officials and other community actors identify, work toward, and achieve common goals
3. Functional and Operational Expertise and Planning
 - Requires knowledge of service areas and delivery options
4. Service Delivery Management
 - Maintains a consistently high level of quality in staff work, operational procedures, and service delivery
5. Strategic Leadership
 - Sets an example that urges the organization and the community toward experimentation, change, creative problem solving, and prompt action
6. Democratic Advocacy and Citizen Participation
 - Demonstrates a commitment to democratic principles by respecting elected officials, community interest groups, and the decision making process
7. Diversity
 - Understands and values the differences among individuals and fosters these values throughout the organization and community
8. Budgeting
 - Prepares and administers the budget
9. Financial Analysis
 - Interprets financial information to assess the short-term and long-term fiscal condition of the community
10. Human Resources Management
 - Ensures the policies and procedures for employee hiring, promotion, performance appraisal, and discipline are equitable, legal and current
11. Strategic Planning
 - Positions the organization and the community for events and circumstances that are anticipated in the future
12. Advocacy and Interpersonal Communication
 - Facilitates the flow of ideas, information, and understanding between and among individuals
13. Presentation Skills
 - Conveys ideas or information effectively to others
14. Media Relations
 - Communicates information to the media in a way that increases public understanding of local government issues and activities
15. Integrity
 - Demonstrates fairness, honesty, and ethical and legal awareness in personal and professional relationships and activities
16. Personal Development
 - Demonstrates a commitment to a balanced life.

Additional Competencies

1. Staff Effectiveness
 - a. Staffing
 - b. Supervision
2. Policy Facilitation
 - a. Council Relations
 - b. Political Acumen
 - c. Strategic Planning
 - d. Accomplishment of Goals
 - e. Negotiation
 - f. Excellence in Policy Facilitation
3. Functional and Operational Expertise and Planning
 - a. Technical and Professional Proficiency
 - b. Implements the Approved Business Plan
 - c. Input to Change
4. Additional Service Delivery Management
 - a. Communicates and Builds Relationships
 - b. Service Orientation
 - c. Demonstrates Job Knowledge
 - d. Effectiveness of Relationship
 - e. Productivity
 - f. Uses Efficient Practices
 - g. Commitment to Quality of Life for Citizens
5. Strategic Leadership
 - a. Demonstrates Business Acumen
 - b. Innovation
 - c. Leadership
 - d. Adaptability
 - e. Decision Making & Performance
 - f. Leadership Style
 - g. Risk Management
 - h. Drives Innovative Change
6. Democratic Advocacy and Citizen Participation
 - a. Effectiveness Factors – External & Internal Influences
7. Diversity
 - a. Citizen Relations
 - b. Developing Others
 - c. Develops Culture & People
8. Budgeting
 - a. Resource and Fiscal Management
9. Financial Analysis
 - a. Fiscal Management
10. Human Resources Management
 - a. Building Effective Operations
11. Strategic Planning
 - a. Analytical Thinking
 - b. Results orientation
 - c. Accountability
 - d. Accountable for Results
 - e. Work Habits
12. Advocacy and Interpersonal communication
 - a. Applies Strategic Agility
13. Presentation Skills
 - a. Communication
 - b. Citizen & Council Relationship
14. Media Relations
 - a. Effective Media Relationship
15. Integrity
 - a. Ethics/integrity
 - b. Achievements
 - c. Awareness of Morale
 - d. Builds Trust Through Council and Staff Relations
 - e. Foster a Climate of Mutual Respect
16. Personal Development

Grey County CAO Performance Evaluation

Period of: January 2019 to June 2019

Following Competencies were identified:

1. Staff Development and Performance
2. Policy Facilitation/Achieving Common Goals
3. Service Delivery Management
4. Strategic Leadership
5. Democratic Advocacy and Citizen Participation
6. Diversity
7. Financial Management
8. Strategic Planning
9. Advocacy and Interpersonal Communication
10. Presentation Skills
11. Media Relations
12. Integrity

- | | |
|--------------------------|------------------------------|
| 1. Poor | 4. Exceeds Expectations |
| 2. Below Expectation | 5. Extraordinary Performance |
| 3. Achieves Expectations | |

This template is provided as a guide. Please modify it to suit your municipality's requirements.

Mayor and Council and CAO Performance Evaluation

Template 1.6B: Alternative Performance Evaluation Criteri

As with Template 1.6A: Performance Evaluation Template, this template is based on the International City/Council Management Association (ICMA) Practices for Effective Local Government Management. The same headings used in Template 1.6A are used here, though the alternative evaluation criteria under each heading differ.

Through our survey of CAMA membership, we gathered best practice documents from across Canada. The Alternative Performance Evaluation Criteria have been selected from these documents and are presented here in a similar format and in alignment with the headings used in Template 1.6A.

When you are building your CAO Performance Evaluation Toolkit, you may choose to add in some of these competencies for evaluation.

1. Staff Effectiveness

a) Staffing

- _____ Recruits and retains competent personnel for staff positions
- _____ Applies an appropriate level of supervision to improve any areas of substandard performance
- _____ Stays accurately informed and appropriately concerned about employee relations
- _____ Professionally manages the compensation and benefits plan
- _____ Promotes training and development opportunities for employees at all levels of the organization

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

Rating: (Add the ratings and enter subtotal ____ ÷ 5 = ____ score for this component.

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|--------------------------|------------------------------|
| 1. Poor | 4. Exceeds Expectations |
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CAO's Comments:

b) Supervision

- _____ Encourages heads of departments to make decisions within their jurisdictions with minimal city manager involvement, yet maintains general control of operations by providing the right amount of communication to the staff
- _____ Instills confidence and promotes initiative in subordinates through supportive rather than restrictive controls for their programs while still monitoring operations at the department level
- _____ Develops and maintains a friendly and informal relationship with the staff and work force in general, yet maintains the professional dignity of the city manager's office
- _____ Sustains or improves staff performance by evaluating the performance of staff members at least annually, setting goals and objectives for them, periodically assessing their progress, and providing appropriate feedback
- _____ Encourages teamwork, innovation, and effective problem-solving among the staff members

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

Rating: (Add the ratings and enter subtotal ____ ÷ 5 = ____ score for this component.

CAO's Comments:

2. Policy facilitation

a) Council Relations

- _____ Presents all issues to Council in a timely fashion.
- _____ Facilitates Council's governance, decision-making, and committee work.

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|--------------------------|------------------------------|
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_____ Takes initiative to advise Council on non-routine matters.

_____ Respects the division of authority between Council and the CAO.

_____ Identifies and establishes formal business partnerships to achieve mutual benefits and desired business outcomes.

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

Rating: (Add the ratings and enter subtotal ____ ÷ 5 = ____ score for this component.

CAO's Comments:

b) Political Acumen

_____ Offers workable alternatives to the governing body for changes in law or policy when an existing policy ordinance is no longer practical.

_____ Appropriately represents Council's direction and guides the work of senior management in support of Council direction.

_____ Anticipates the possible impacts of decisions on the political environment.

_____ Coaches others to consider the political implications of decisions.

_____ Communicates key issues and/or influencing factors and explains the impact with the organization.

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

- | | |
|--------------------------|------------------------------|
| 1. Poor | 4. Exceeds Expectations |
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Rating: (Add the ratings and enter subtotal ____ ÷ 5 = ____ score for this component.

CAO's Comments:

c) Strategic Planning

- _____ Leads the municipality and articulates a clear plan for the municipality that reflects Council's vision, mission and strategic plan, and is well understood, widely supported, consistently applied, and effectively implemented.
- _____ Establishes direction based on continual assessment of environment and emerging trends, issues, and opportunities.
- _____ Develops programs and services that work toward achieving the vision and strategic initiatives set by Council.
- _____ Possesses the strategic skills to anticipate opportunities and overcome challenges.
- _____ Obtains and allocates resources consistent with strategic objectives.

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

- | | |
|--------------------------|------------------------------|
| 1. Poor | 4. Exceeds Expectations |
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| 3. Achieves Expectations | |

Rating: (Add the ratings and enter subtotal ___ ÷ 5 = ___ score for this component.

CAO's Comments:

d) Accomplishment of Goals

_____ Participates in the development of annual priorities with Council and senior management; identifies new initiatives for Council to consider.

_____ Ensures there is a clear mandate to achieve certain objectives on behalf of Council.

_____ Is comfortable working in a collegial fashion with senior management in identifying and accomplishing the priorities of Council; able to provide leadership to staff in their departmental business planning.

_____ Engages others in order to accomplish organizational goals and strategies.

_____ Reaches deals and compromises that work best for the organization, considers other opinions while holding strong to firm directions and goals.

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

Rating: (Add the ratings and enter subtotal ___ ÷ 5 = ___ score for this component.

CAO's Comments:

- | | |
|--------------------------|------------------------------|
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e) Negotiation

- _____ Responds to conflict directly and uses facts to gain support.
- _____ Seeks fairness and equity in decisions yet may take a firm position with stakeholders when circumstances warrant.
- _____ Builds trust and strong supports to push objectives forward and develop win/win solutions.
- _____ Remains objective and neutral, clarifies the issues and concerns of all sides to assist in collaboration and solution building.
- _____ Recognizes when parties are unwilling to compromise and adapts approach in order to resolve the issue.

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

Rating: (Add the ratings and enter subtotal ____ ÷ 5 = ____ score for this component.

CAO's Comments:

f) Excellence in Policy Facilitation

- _____ Responds to conflict directly and uses facts to gain support.
- _____ Seeks fairness and equity in decisions yet may take a firm position with stakeholders when circumstances warrant.

- | | |
|--------------------------|------------------------------|
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_____ Builds trust and strong supports to push objectives forward and develop win/win solutions.

_____ Remains objective and neutral, clarifies the issues and concerns of all sides to assist in collaboration and solution building.

_____ Recognizes when parties are unwilling to compromise and adapts approach in order to resolve the issue.

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

Rating: (Add the ratings and enter subtotal ____ ÷ 5 = ____ score for this component.

CAO's Comments:

3. Functional and operational expertise and planning

a) Technical & Professional Proficiency

_____ Stays current with technical knowledge.

_____ Attends to personal professional development and training.

_____ Uses exemplary reporting and research approaches.

_____ Consistently demonstrates effective organizational skills.

_____ Effectively uses analytical and application skills.

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|--------------------------|-------------------------|
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| 3. Achieves Expectations | Performance |

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

Rating: (Add the ratings and enter subtotal ___ ÷ 5 = ___ score for this component.

CAO's Comments:

b) Implements the Approved Business Plan

_____ Drive improvements in corporate performance through innovation training.

_____ Enhance performance measurement and improve the overall quality and accuracy of performance measures in the business plan.

_____ Promote fiscal discipline and accountability.

_____ Ensure proper processes are in place for capital budget priority setting, the maintenance and funding of critical infrastructure, and identification of funding gaps.

_____ Ensure the municipality is positioned to access all funding programs for which it is eligible from senior levels of government.

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

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|--------------------------|------------------------------|
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Rating: (Add the ratings and enter subtotal ___ ÷ 5 = ___ score for this component.

CAO's Comments:

c) Input to Change

_____ Develops new work methods or techniques to carry out assigned tasks in a more efficient or productive manner.

_____ Readily adjusts to new concepts and/or procedures.

_____ Willingly makes changes in responsibilities and routines to meet the needs of the situation, and to provide the best possible service.

_____ Shows leadership in implementing changes and providing guidance to peers as a change agent.

_____ Flexibly adjusts activities and service deliverables when problems or deviations to action plans occur.

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

Rating: (Add the ratings and enter subtotal ___ ÷ 5 = ___ score for this component.

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CAO's Comments:

4. Additional Service Delivery Management

a) Communicates and Builds Relationships

- _____ Communicates complex ideas in a persuasive and compelling manner.
- _____ Champions and facilitates cross-departmental integration and develops partnerships to promote collaboration.
- _____ Maintains a robust network of mutually beneficial professional contacts.
- _____ Demonstrates an organization-wide prospective on business issues.
- _____ Proactively works to eliminate barriers between departments.

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

Rating: (Add the ratings and enter subtotal ____ ÷ 5 = ____ score for this component.

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|--------------------------|------------------------------|
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CAO's Comments:

b) Service Orientation

- _____ Follows through on commitments and responds to inquiries, emails, requests and complaints in a timely fashion.
- _____ Builds and maintains connections with internal and external groups that could improve organizational delivery and/or client satisfaction.
- _____ Analyzes and anticipates the clients long term business needs by establishing a clear sense of their organizational and business strategies.
- _____ Builds strong collaborative and mutually beneficial relationships with clients and partner agencies.
- _____ Identifies future/prospective clients and develops strategies for gaining/attaining their business.

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

Rating: (Add the ratings and enter subtotal ____ ÷ 5 = ____ score for this component.

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|--------------------------|------------------------------|
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CAO's Comments:

c) Demonstrates Job Knowledge

_____ Appreciates role in the overall success of the municipality.

_____ Continually makes a conscious effort to improve job related knowledge, skills and/or capabilities.

_____ Proves technical or vocational knowledge to competently perform the job duties.

_____ Maintains current knowledge of legislative and/or regulatory requirements.

_____ Takes courses and/or seminars and applies the new knowledge/skill appropriately for work improvements

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

Rating: (Add the ratings and enter subtotal ____ ÷ 5 = ____ score for this component.

CAO's Comments:

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|--------------------------|------------------------------|
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d) Effectiveness of Relationships

_____ Approaches duties with a customer focus.

_____ Demonstrates consideration and respect for the different disciplines, cultures and values of the public, clients, other staff and Council members.

_____ Maintains emotional control and objectivity when dealing with the service requests and public inquiries.

_____ Promotes a positive image of the municipality in the community and demonstrates effective interaction with clients, community officials, visitors, and the public.

_____ Promptly returns phone messages.

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

Rating: (Add the ratings and enter subtotal ____ ÷ 5 = ____ score for this component.

CAO's Comments:

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|--------------------------|------------------------------|
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d) Productivity

_____ Experience in the position has improved productivity.

_____ As productivity increases, the quality of work remains high.

_____ All projects and assignments for which the CAO is responsible are successfully completed.

_____ Frequency of errors is low and the employee's attitude towards them is positive and responsible.

_____ Reports and recommendations contain reliable information and work is thorough and succinct.

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

Rating: (Add the ratings and enter subtotal ____ ÷ 5 = ____ score for this component.

CAO's Comments:

e) Uses Efficient Practices

_____ Drives continuous improvement to ensure organizational practices support the strategic priorities.

_____ Assists Council in resolving problems at the administrative level to avoid unnecessary council action.

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_____ Uses fact based business cases which balance intuition of what will drive results.

_____ Champions effective resource management to deliver quality results.

_____ Prepares for employees eligible for retirement by focusing on talent management and succession planning.

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

Rating: (Add the ratings and enter subtotal ____ ÷ 5 = ____ score for this component.

CAO's Comments:

f) Commitment to Quality of Life for Citizens

_____ Ensures actions taken and results achieved are consistent with the values and environment desired by municipal residents.

_____ Continues to leverage technology to grow citizen self-service opportunities with more online and mobile services and information.

_____ Supports Council in developing plans and initiatives to promote and serve community interests.

_____ Is an effective ambassador for the municipality by speaking at conferences and community events as requested.

_____ Ensures focus on and advancement of key strategic projects.

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|--------------------------|------------------------------|
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Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

Rating: (Add the ratings and enter subtotal ____ ÷ 5 = ____ score for this component.

CAO's Comments:

5. Strategic Leadership

a) Demonstrates Business Acumen

_____ Models business planning discipline and financial rigour.

_____ Fosters the creation and use of fact-based business cases.

_____ Makes timely decisions that balance risks and benefits of a range of potential solutions.

_____ Links business decisions with the strategic direction and long-term sustainability of the organization.

_____ Leverages an understanding of interpersonal dynamics to influence business results.

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

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|--------------------------|------------------------------|
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Rating: (Add the ratings and enter subtotal ____ ÷ 5 = ____ score for this component.

CAO's Comments:

b) Innovation

_____ Looks for creative solutions that support a culture of continuous improvement.

_____ Creates a culture that supports risk-taking and innovation.

_____ Evaluates implementation and learns from mistakes.

_____ Approaches problem solving from different angles to achieve the best solution.

_____ Overcomes obstacles with resourcefulness and creativity, and rewards the same in others.

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

Rating: (Add the ratings and enter subtotal ____ ÷ 5 = ____ score for this component.

- | | |
|--------------------------|------------------------------|
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| 2. Below Expectation | 5. Extraordinary Performance |
| 3. Achieves Expectations | |

CAO's Comments:

c) Leadership

- _____ Creates and nurtures a culture that attracts, retains, and motivates talented people.
- _____ Exercises discretion and judgment in handling sensitive information.
- _____ Maintains a high degree of personal integrity and commitment.
- _____ Builds trust through presenting ideas clearly and effectively listening to others, even when not in agreement.
- _____ Leads management team by providing constructive feedback, corrective action, and recognition as appropriate.

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

Rating: (Add the ratings and enter subtotal ____ ÷ 5 = ____ score for this component.

CAO's Comments:

d) Adaptability

- _____ Responds positively to changing needs and conditions.

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| 1. Poor | 4. Exceeds Expectations |
| 2. Below Expectation | 5. Extraordinary Performance |
| 3. Achieves Expectations | |

_____ Recognizes potential situations and responds with solutions, tactics or approaches to reduce or eliminate issues.

_____ Considers benefits, costs and impacts to the overall organization.

_____ Strategically plans and initiates long term goals and changes to ensure the organization is responsive to a diverse range of needs and situations.

_____ Shifts priorities and alters strategies to respond to emerging opportunities or risks.

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

Rating: (Add the ratings and enter subtotal ____ ÷ 5 = ____ score for this component.

CAO's Comments:

e) Decision Making & Performance

_____ Demonstrates problem solving skills.

_____ Seeks to understand the needs of customers (external and internal) and meets their expectations.

_____ Generates creative ideas and solutions.

_____ Demonstrates innovative thinking.

_____ Ensures effective use of human and material resources.

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

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|--------------------------|------------------------------|
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Rating: (Add the ratings and enter subtotal ____ ÷ 5 = ____ score for this component.

CAO's Comments:

f) Leadership Style

- _____ Demonstrates strength of administrative leadership through decisiveness, and the high quality of decisions.
- _____ Offers high quality of policy advice, guidance, and direction to Council for the development of its decisions and policies.
- _____ Shows qualities of approachability; responsiveness to the feedback and input received from members of Council.
- _____ Demonstrates ability to identify and communicate to Council issues or areas of concern impacting Council's relationship to the administration
- _____ Demonstrates comfort in suggesting new initiatives; reviews the current state of affairs and recommends positive improvements.

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

- | | |
|--------------------------|------------------------------|
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| 3. Achieves Expectations | |

Rating: (Add the ratings and enter subtotal ____ ÷ 5 = ____ score for this component.

CAO's Comments:

g) Risk Management

- _____ Seeks solutions and improvements based on an assessment of risk and exposure.
- _____ Demonstrates leadership to foster safe work practices and policies.
- _____ Shifts priorities and alters strategies to respond to emerging opportunities or risks.
- _____ Effectively identifies, assesses and manages the principal risks to the municipality
- _____ Keeps Council fully informed of all significant operational, financial, and advocacy matters and risks relevant to the municipality.

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

Rating: (Add the ratings and enter subtotal ____ ÷ 5 = ____ score for this component.

CAO's Comments:

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|--------------------------|------------------------------|
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| 2. Below Expectation | 5. Extraordinary Performance |
| 3. Achieves Expectations | |

h) Drives Innovative Change

_____ Introduces and champions the rationale for change.

_____ Anticipates the effects of change and develops plans to manage impacts.

_____ Proactively leads change processes.

_____ Fosters innovation and demonstrates a willingness to take calculated risks and learn from mistakes.

_____ Monitors organizational progress and adjusts change processes accordingly.

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

Rating: (Add the ratings and enter subtotal ____ ÷ 5 = ____ score for this component.

CAO's Comments:

6. Democratic advocacy and citizen participation

a) Effectiveness Factors – External & Internal Influences

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| 1. Poor | 4. Exceeds Expectations |
| 2. Below Expectation | 5. Extraordinary Performance |
| 3. Achieves Expectations | |

_____ Develops solutions that consider internal and external factors with the focus on the long term objectives of the organization.

_____ Uses best practices to manage significant external influences that impact the municipality.

_____ Mobilizes community resources and address prevailing public expectations of the municipality.

_____ Analyzes whether municipal resources are linked, integrated, and appropriated allocated.

_____ Identifies human elements required to respond to issues and opportunities.

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

Rating: (Add the ratings and enter subtotal ____ ÷ 5 = ____ score for this component.

CAO's Comments:

7. Diversity

a) Citizen Relations

_____ Demonstrates no bias when working with all news media .

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| 1. Poor | 4. Exceeds Expectations |
| 2. Below Expectation | 5. Extraordinary |
| 3. Achieves Expectations | Performance |

_____ Works to understand community concerns by meeting with and listening to members of the community.

_____ Takes initiative to maintain citizen satisfaction with municipal services.

_____ Offers dedicated service to the municipality.

_____ Ensures that the municipality retains appropriate rate-payer engagement.

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

Rating: (Add the ratings and enter subtotal ____ ÷ 5 = ____ score for this component.

CAO's Comments:

b) Developing Others

_____ Provides visible and positive leadership through empowerment, coaching and mentoring and delegation.

_____ Fosters a positive, productive and accountable working environment that rewards excellence.

_____ Delegates authority and responsibility to employees giving them latitude to make decisions and perform tasks in their own way.

_____ Develops an effective senior management team.

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|--------------------------|------------------------------|
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| 3. Achieves Expectations | |

_____ Ensures personal growth and competence through his / her own education and training.

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

Rating: (Add the ratings and enter subtotal ____ ÷ 5 = ____ score for this component.

CAO's Comments:

c) Develops Culture & People

_____ Influences others by promoting and modeling the importance of municipal values.

_____ Develops leaders through regular coaching, career planning and proactive performance management.

_____ Creates effective leadership teams and supports an open exchange of ideas.

_____ Delegates appropriate levels of authority and empowers others.

_____ Appreciates the impact of cross-cultural and generational differences.

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

- | | |
|--------------------------|------------------------------|
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| 3. Achieves Expectations | |

Rating: (Add the ratings and enter subtotal ____ ÷ 5 = ____ score for this component.

CAO's Comments:

8. Budgeting

a) Resource and Fiscal Management

_____ Understands and appreciates the time restrictions of others; limits questioning and conversations to essential requirements of the position.

_____ Adheres to all internal control procedures, forwards concerns and complies with organizational policies, procedures and practices surrounding resources, time and finances.

_____ Monitors organizational or departmental budgets, ensuring compliance, offering feedback and cost saving alternatives to senior management.

_____ Develops and maintains an internal control system that protects organizational funds and assets.

_____ Monitors and develops overall liabilities, revenues and expenditures; revises and realigns budgets and commitments based on changing needs.

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

- | | |
|--------------------------|------------------------------|
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Rating: (Add the ratings and enter subtotal ____ ÷ 5 = ____ score for this component.

CAO's Comments:

9. Financial analysis

a) Financial Plans

- _____ Establishes objectives, operating, and financial plans for the municipality that meet the needs of the rate-payers, employees, and the broader community.
- _____ Ensures the municipality meets or exceeds the financial and operating performance goals as set out in the annual plans.
- _____ Ensures business strategy is linked to creating value for customers.
- _____ Uses sound risk management strategies and engages legal counsel as appropriate.
- _____ Incorporates best practices from public and private sectors related to management and administration.

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

Rating: (Add the ratings and enter subtotal ____ ÷ 5 = ____ score for this component.

CAO's Comments:

- | | |
|--------------------------|------------------------------|
| 1. Poor | 4. Exceeds Expectations |
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b) Fiscal Management

_____ Prepares a balanced budget to provide services at a level directed by council.

_____ Makes the best possible use of available funds, conscious of the need to operate the local government efficiently and effectively.

_____ Prepares a budget and budgetary recommendations in an intelligent and accessible format.

_____ Ensures actions and decisions reflect an appropriate level of responsibility for financial planning and accountability.

_____ Appropriately monitors and manages fiscal activities of the organization.

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

Rating: (Add the ratings and enter subtotal ____ ÷ 5 = ____ score for this component.

CAO's Comments:

10. Human resources management

Building Effective Operations

_____ Works closely with Council to develop long range perspective to organizational and administrative issues.

_____ Listens to staff input and responds accordingly and involves senior staff in decision making processes.

- | | |
|--------------------------|------------------------------|
| 1. Poor | 4. Exceeds Expectations |
| 2. Below Expectation | 5. Extraordinary Performance |
| 3. Achieves Expectations | |

_____ Actively builds and maintains positive relationships across the organization, with the public, user groups and external stakeholders.

_____ Actively responds to inquiries and communicates municipal policies, procedures and processes.

_____ Balances the interests of the public with those of the Corporation to maximize overall results..

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

Rating: (Add the ratings and enter subtotal ____ ÷ 5 = ____ score for this component.

CAO's Comments:

11. Strategic planning

a) Analytical Thinking

_____ Recognizes situations and examines facts in order to develop clear steps and solid assumptions.

_____ Looks at past practice and gathers additional information in order to make sound choices.

_____ Adjusts and reprioritizes timeframes and deadlines in response to new situations or information.

- | | |
|--------------------------|------------------------------|
| 1. Poor | 4. Exceeds Expectations |
| 2. Below Expectation | 5. Extraordinary Performance |
| 3. Achieves Expectations | |

_____ Adjusts and reprioritizes timeframes and deadlines in response to new situations or information.

_____ Evaluates, interprets and analyses critical, complex information.

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

Rating: (Add the ratings and enter subtotal ____ ÷ 5 = ____ score for this component.

CAO's Comments:

b) Results Orientation

_____ Operates with high attention to detail regarding organizational and departmental performance goals.

_____ Demonstrates a focus on finishing all tasks assigned in a timely manner while taking complete ownership of tasks.

_____ Acts as a role model or coach for others to drive positive results.

_____ Holds oneself and others accountable for effectively meeting and exceeding organizational and departmental goals.

_____ Establishes challenging goals for oneself and acts to reach and exceed them; holds others accountable for their own goals.

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|--------------------------|-------------------------|
| 1. Poor | 4. Exceeds Expectations |
| 2. Below Expectation | 5. Extraordinary |
| 3. Achieves Expectations | Performance |

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

Rating: (Add the ratings and enter subtotal ___ ÷ 5 = ___ score for this component.

CAO's Comments:

c) Accountability

_____ Effectively leads and manages the business and financial affairs of the municipality.

_____ Takes responsibility for actions.

_____ Honours commitments.

_____ Results oriented – can be relied upon to achieve desired or best achievable outcome.

_____ Aligns the objectives and practices of multiple teams to accomplish the municipality's mission and goals.

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

- | | |
|--------------------------|------------------------------|
| 1. Poor | 4. Exceeds Expectations |
| 2. Below Expectation | 5. Extraordinary Performance |
| 3. Achieves Expectations | |

Rating: (Add the ratings and enter subtotal ____ ÷ 5 = ____ score for this component.

CAO's Comments:

d) Accountable for Results

_____ Sets clear and focused organizational and departmental objectives and plans & implements business plan as approved by Council

_____ Links organizational plans to strategic priorities and articulates specific expectations and benefits

_____ Demonstrates a strong sense of initiative in pursuing organizational objectives

_____ Drives accountability by establishing performance measurement against objectives

_____ Proactively addresses performance issues and drives solutions to improve outcomes

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

Rating: (Add the ratings and enter subtotal ____ ÷ 5 = ____ score for this component.

CAO's Comments:

- | | |
|--------------------------|------------------------------|
| 1. Poor | 4. Exceeds Expectations |
| 2. Below Expectation | 5. Extraordinary Performance |
| 3. Achieves Expectations | |

e) Work Habits

- _____ Exhibits a conscious effort towards safety and orderliness at the work site for clients, other employees and the public.
- _____ Initiates or recommends any safety precautions to avoid potential recurrence of an accident/incident.
- _____ Reports for work on time (i.e., scheduled starts, breaks and finishing of the day) and has good attendance.
- _____ Conveys a clean, safe, and professional image through personal hygiene, grooming, and appearance.
- _____ Applies effective time management to activities.

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

Rating: (Add the ratings and enter subtotal ____ ÷ 5 = ____ score for this component.

CAO's Comments:

12. Advocacy and interpersonal communication

a) Applies Strategic Agility

- _____ Develops processes to monitor and assess the potential implications of emerging internal and external trends.
- _____ Proactively identifies key community issues, anticipates impacts and develops strategies to address them.

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|--------------------------|------------------------------|
| 1. Poor | 4. Exceeds Expectations |
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| 3. Achieves Expectations | |

_____ Leads in creating and refining the strategic direction of the organization.

_____ Uses flexibility to refine and adapt strategic direction/priorities/tactics as change occurs.

_____ Communicates the strategic direction and priorities of the organization in a clear and compelling manner.

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

Rating: (Add the ratings and enter subtotal ____ ÷ 5 = ____ score for this component.

CAO's Comments:

13. Presentation skills

a) Communications

_____ Possesses strong verbal, written and presentation skills demonstrating a clear, concise and positive style

_____ Effectively establishes rapport with stakeholders including Council, employees, external agencies, partners and community members

_____ Maintains positive media relations

_____ Effectively exchanges (obtains and transmits) information, in a variety of mediums, for diverse audiences

_____ Disseminates complete and accurate information equally to all Council members in a timely manner.

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|--------------------------|------------------------------|
| 1. Poor | 4. Exceeds Expectations |
| 2. Below Expectation | 5. Extraordinary Performance |
| 3. Achieves Expectations | |

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

Rating: (Add the ratings and enter subtotal ____ ÷ 5 = ____ score for this component.

CAO's Comments:

b) Citizen & Council Relationships

_____ Promotes a positive image of the municipality.

_____ Demonstrates effective interaction with clients, community officials, and visitors.

_____ Acts as the facilitator to define and manage excellent relationships with the region, the Provincial Government, the Association of Municipal Organizations (AMO), the Federation of Canadian Municipalities and other branches of government and the broader public sector in general.

_____ Co-ordinates and facilitates the flow of information between the administration and Council and its committees.

_____ Capitalizes on opportunities to enhance stakeholder relations.

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

- | | |
|--------------------------|------------------------------|
| 1. Poor | 4. Exceeds Expectations |
| 2. Below Expectation | 5. Extraordinary Performance |
| 3. Achieves Expectations | |

Rating: (Add the ratings and enter subtotal ____ ÷ 5 = ____ score for this component.

CAO's Comments:

14. Media relations

a) Effective Media Relationships

_____ Effectively engages the media when called upon to do so.

_____ Develops and maintains positive media relations.

_____ Uses the most efficient and appropriate medium to communicate without risking mutual understanding (e.g. email, telephone, face-to-face, advertising, meetings, etc.)

_____ Effectively communicates ideas through meetings, conferences and written reports.

_____ Works with the media to communicate important information about municipal activities, programs, and issues.

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

Rating: (Add the ratings and enter subtotal ____ ÷ 5 = ____ score for this component.

CAO's Comments:

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|--------------------------|------------------------------|
| 1. Poor | 4. Exceeds Expectations |
| 2. Below Expectation | 5. Extraordinary Performance |
| 3. Achieves Expectations | |

15. Integrity

a) Ethics/Integrity

_____ Acts to create a positive image for the municipality and/or have a positive impact on the community.

_____ Ensures public processes are transparent and accountability is clear when dealing with issues.

_____ Exercises good judgment, understands and prioritizes conflicting demands.

_____ Promotes ethical behaviour and holds individuals at all levels, including external contractors and internal staff, accountable for meeting ethical standards.

_____ Models consistent values of high ethical awareness, honesty, fairness, and courage.

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

Rating: (Add the ratings and enter subtotal ____ ÷ 5 = ____ score for this component.

CAO's Comments:

b) Achievements

_____ Considers customer satisfaction while carrying out duties and achieves positive results for the customer.

_____ Uses sound/viable/realistic research and analysis of available facts and options in decision-making processes.

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|--------------------------|-------------------------|
| 1. Poor | 4. Exceeds Expectations |
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| 3. Achieves Expectations | Performance |

_____ Seeks input/involvement of all stakeholders in action planning and decision-making processes and conducts adequate follow-up/feedback to stakeholders re: implementation and impact/benefits.

_____ Any tasks/projects initiated beyond the job responsibilities and set goals and objectives contributed to the Corporation's operational improvement and/or enhanced customer service.

_____ Accepts responsibility and accountability for the results of actions.

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

Rating: (Add the ratings and enter subtotal ____ ÷ 5 = ____ score for this component.

CAO's Comments:

c) Awareness of Morale

_____ Empowers and supports decision-makers.

_____ Motivates others by communicating a clear sense of purpose.

_____ Fosters employee engagement and takes time to recognize successes.

_____ Coaches leaders on how to support people through change government.

_____ Effectively responds to any issues of staff morale and satisfaction.

- | | |
|--------------------------|------------------------------|
| 1. Poor | 4. Exceeds Expectations |
| 2. Below Expectation | 5. Extraordinary Performance |
| 3. Achieves Expectations | |

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

Rating: (Add the ratings and enter subtotal ____ ÷ 5 = ____ score for this component.

CAO's Comments:

d) Builds Trust through Council and Staff Relations

_____ Carries out directives of the Council as a whole rather than those of any one council member.

_____ Is courteous, sincere and positive in attitude and response to citizens and Council.

_____ Shows willingness to be helpful and responds promptly and effectively to inquiries and requests by Council and others.

_____ Receptive to constructive criticism and advice.

_____ Regular status reports are provided on progress towards Council objectives.

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

Rating: (Add the ratings and enter subtotal ____ ÷ 5 = ____ score for this component.

- | | |
|--------------------------|------------------------------|
| 1. Poor | 4. Exceeds Expectations |
| 2. Below Expectation | 5. Extraordinary Performance |
| 3. Achieves Expectations | |

CAO's Comments:

e) Fosters a Climate of Mutual Respect

_____ Lives the corporate values.

_____ Build alignment and engagement among employees and teams.

_____ Sustains a respectful workplace.

_____ Attracts, retains and develops a talented and diverse labour pool.

_____ Demonstrates active support for the development of individuals identified through a Succession Program.

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

Rating: (Add the ratings and enter subtotal ____ ÷ 5 = ____ score for this component.

CAO's Comments:

- | | |
|--------------------------|-------------------------|
| 1. Poor | 4. Exceeds Expectations |
| 2. Below Expectation | 5. Extraordinary |
| 3. Achieves Expectations | Performance |

16. Personal development

_____ Values lifelong learning in oneself and others.

_____ Reads trade journals, professional vocational-related material, community-oriented needs/development issues, articles or surveys, etc. regularly to keep informed of changes in the industry and/or community.

_____ Actively participates in personal or professional development activities, both within and outside the Corporation

_____ Identifies any professional development needs or opportunities.

_____ Ensures personal growth and competence through his / her own education and training.

Council's Comments (if required), or examples provided for other than "Achieves Expectations" rating:

Rating: (Add the ratings and enter subtotal ___ ÷ 5 = ___ score for this component.

CAO's Comments:

- | | |
|--------------------------|------------------------------|
| 1. Poor | 4. Exceeds Expectations |
| 2. Below Expectation | 5. Extraordinary Performance |
| 3. Achieves Expectations | |

Sources:

International City/Council Management Association City Manager Performance Evaluation

Town of Canmore Annual Performance Review for the Chief Administrative Officer

Town of White City Town Manager's Performance Evaluation

Municipality of Jasper Organizational Success Discussion Guidelines (CAO Performance Evaluation) Feb 6, 2015 Updated Version

Town of Essex Chief Administrative Officer Performance Evaluation

Town of Olds Performance Evaluation of the Chief Administrative Officer

Town of Torbay Staff Evaluation: Chief Administrative Officer

City of Mississauga Performance Evaluation: Senior Management 2015

County of Elgin Performance Development and Review Program