



VILLAGE OF INNISFREE
POLICY

EFFECTIVE DATE	REVISED DATE	RESOLUTION #	POLICY NUMBER
2021-02-16		2021-02-16/07	1900-14

TITLE: CAO Evaluation Process Policy

Policy Statement

Systematic and rigorous monitoring of the Chief Administrative Officer’s (CAO’s) job performance will be measured against the expected results to be achieved by the CAO. This will include the corporate accomplishment of Council policies on outcomes and corporate operation within the boundaries established within Council policies.

It is also vital that the CAO’s salary be examined and adjusted as part of the monitoring and assessment process in order to provide fair and reasonable compensation for the quality of the CAO’s performance.

Purpose

1. To ensure Council fulfills the *Municipal Government Act (MGA)* requirements to provide the CAO with an annual written performance evaluation of the results the CAO has achieved with respect to fulfilling the CAO’s responsibilities under the MGA.
2. To determine the degree to which Council policies and programs are being implemented.
3. To provide a framework for the CAO performance evaluation that maintains, strengthens and/or makes necessary changes to the relationship between Council and the CAO.
4. To provide for timely adjustment to the CAO’s salary and benefits reflective of job performance.
5. To determine the appropriate professional development direction and opportunities for the CAO.

Policy Procedures

1. Performance evaluation is to be held annually prior to the anniversary date of employment of the CAO.
2. Council will establish a CAO Performance Evaluation Committee consisting of the Mayor and two Councillors to conduct the CAO performance evaluation. Appointments of the Council members to act on the Committee shall be made annually at the Organizational Meeting. The Committee shall determine the date of the evaluation.



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3. The Committee shall conduct interviews with senior staff members to gather feedback on the CAO's performance by using Part 2 of the CAO Performance Evaluation Form attached to this policy.
4. The CAO Performance Evaluation Form, Part 1 attached to this Policy shall be distributed to all members of Council for their input and completed by the date determined by the Committee. All comments shall be presented such that no name is connected with any comment. This information will be collected and aggregated by the Committee and composite results will be consolidated into an evaluation summary document and circulated to all members of Council at a closed-session meeting in accordance with Section 19 of the *Freedom of Information and Protection of Privacy Act (FOIP)*. At this point, the CAO shall not receive any of the input.
5. The completed evaluation summary document will then be presented to the CAO, and the Committee and CAO shall discuss the feedback at a closed-session meeting to enable completed feedback.
6. To complete the process:
 - a. The CAO shall respond in writing to the Committee with respect to the feedback.
 - b. The feedback shall be circulated to all members of Council, who will sign off on the completed evaluation including the CAO's feedback.
 - c. The CAO shall be requested to sign the performance evaluation document including the CAO's feedback and the original will be kept on file in a confidential personnel file with copies retained by all of Council and the CAO.
 - d. Council shall subsequently determined any CAO's remuneration adjustments based on economic conditions, benchmark data, performance and any other factors.
 - e. Council shall pass by resolution at a regular Council meeting that the annual CAO Performance Evaluation was completed in accordance with Section 205.1 of the MGA.

CAO Performance Evaluation Form

1. Schedule "A" – CAO Performance Evaluation

Date

Mayor

Chief Administrative Officer



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Schedule "A" 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 LEADERSHP EFFECTIVENESS

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

2. Obtains and allocates resources consistent with strategic objectives. Rating _____

3. Demonstrates a good understanding of the major issues facing the Council and the Municipality. Rating _____

4. Exercises good judgement in dealing with major issues. Rating _____

5. Demonstrates consistent values of high ethical awareness, honesty, fairness and courage. Rating _____



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

7. Provides positive leadership to staff and elected officials. Rating _____

8. 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 matter. Rating _____

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

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

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



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

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

RELATIONSHIP WITH STAFF

1. Actively supports and encourages professional development among the staff. Rating _____

2. Effectively attains, retains, motivates and leads a team capable of achieving municipal objectives. Rating _____

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

4. Promotes a clear understanding of roles between staff and elected officials. Rating _____

5. 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 _____



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6. Ensures that staff are involved in a meaningful way with decision making. Rating _____

7. 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 Municipality in a positive light. Rating _____



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6. Ensure that the Municipality maintains appropriate public engagement. Rating _____

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 all is 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 that 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:

Key Objectives	Results

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: _____