

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

**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 CRITERIA

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

#### 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.

CAO’s Comments:

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|--------------------------|-------------------------|
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## 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

### COUNCIL RELATIONS

- \_\_\_\_\_ Presents all issues to Council in a timely fashion.
- \_\_\_\_\_ Facilitates Council’s governance, decision-making, and committee work.
- \_\_\_\_\_ 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:

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

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

CAO's Comments:

### 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:

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

CAO's Comments:

### 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.

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

\_\_\_\_\_ 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:

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

CAO's Comments:

### 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:

### NEGOTIATION

\_\_\_\_\_ Responds to conflict directly and uses facts to gain support.

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

- \_\_\_\_\_ 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:

### 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.
- \_\_\_\_\_ 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:

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

### 3 FUNCTIONAL AND OPERATIONAL EXPERTISE AND PLANNING

#### 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.

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:

#### 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:

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

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

CAO's Comments:

### 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.

CAO's Comments:

## 4 ADDITIONAL SERVICE DELIVERY MANAGEMENT

### 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:

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

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

CAO's Comments:

### 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.

CAO's Comments:

### 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:



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|--------------------------|------------------------------|
| 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:

### 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:

### 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:

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

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

CAO's Comments:

### 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.
- \_\_\_\_\_ 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:

### 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.

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

\_\_\_\_\_ 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.

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

### 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:

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

CAO's Comments:

### INNOVATION

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

- \_\_\_\_\_ 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.

CAO's Comments:

## 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:

## ADAPTABILITY

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

- \_\_\_\_\_ Responds positively to changing needs and conditions.
- \_\_\_\_\_ 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:

### 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:

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

CAO's Comments:

### LEADERSHIP STYLE

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

- \_\_\_\_\_ 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:

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

CAO's Comments:

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

## 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

### EFFECTIVENESS FACTORS – EXTERNAL & INTERNAL INFLUENCES

- \_\_\_\_\_ 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:

- |                          |                              |
|--------------------------|------------------------------|
| 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:

## 7 DIVERSITY

### CITIZEN RELATIONS

- \_\_\_\_\_ Demonstrates no bias when working with all news media .
- \_\_\_\_\_ 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:

### 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.
- \_\_\_\_\_ 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:



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

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

CAO's Comments:

## 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:

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

CAO's Comments:

## 8 BUDGETING

### 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.

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|--------------------------|-------------------------|
| 1. Poor                  | 4. Exceeds Expectations |
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\_\_\_\_\_ 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:

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

CAO’s Comments:

## 9 FINANCIAL ANALYSIS

### 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:

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

## 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.
- \_\_\_\_\_ 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:

- |                          |                              |
|--------------------------|------------------------------|
| 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:

## 11 STRATEGIC PLANNING

### 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.
- \_\_\_\_\_ 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:

### 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.

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

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

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

CAO's Comments:

### 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:

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

CAO's Comments:

### 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

- |                          |                         |
|--------------------------|-------------------------|
| 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:

## 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

### APPLIES STRATEGIC AGILITY

- \_\_\_\_\_ Develops processes to monitor and assess the potential implications of emerging internal and external trends.

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

- \_\_\_\_\_ Proactively identifies key community issues, anticipates impacts and develops strategies to address them.
- \_\_\_\_\_ 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

### 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.

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             |

## 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:

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

CAO's Comments:

## 14 MEDIA RELATIONS

### 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:



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

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

CAO's Comments:

## 15 INTEGRITY

### 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:

### 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.
- \_\_\_\_\_ 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.

- |                          |                         |
|--------------------------|-------------------------|
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| 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:

### 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.

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:

### 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.

- |                          |                         |
|--------------------------|-------------------------|
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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:

### 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:

## 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.

- |                          |                              |
|--------------------------|------------------------------|
| 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:

## 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