

## APPENDIX 3: CAO PROCESS CHECKLIST

### Recommendations for CAO Performance Evaluation

Initial where appropriate, Complete with Dates as Required, and Circle as Necessary.

For the Year:		Date:
<b>Part 1: CAO Gathers information to create the CAO Handbook for Performance Evaluation</b>		
Review Governance Requirements	Located at: [url]	Attached
Relevant Documents:		
Review Job Description & Employment Agreement	Located at: [url]	Attached
Relevant Documents:		
Set Goals:		
Do the Goals align with the Strategic Plan?	Yes	No
List of Goals:		

Set Date for Strategic Plan Review	Date and time:  Place:	Attendees:
CAO Self-assessment and Mayor and Council Performance Evaluation is based on Template 1.6A: Performance Evaluation	Yes	No
Alternative Competencies to be added from Template 1.6B:		
Confirm the rating instrument meets our needs	Yes	No
Action to take:		
Self-assessment To be completed by: (date)	Yes	No
Mayor and Council Evaluation Timelines are set  These timelines are as follows:	Yes	No

**Part 2: Mayor and Council Compile the *Final Performance Evaluation Report***

The following people will form the sub-committee to compile the evaluations into a single *Final Performance Evaluation Report*:

<i>Final Performance Evaluation Report</i> is compiled	Date:	By:
CAO, Mayor and Council review Final Evaluation Report	Date from:	End Date:

**Part 3: CAO, Mayor and Council meet to Discuss the Performance Evaluation**

Joint review of the Final Report	Date and Time:  Place:	Attended by:
Joint Setting of Goals	Date and Time:  Place:	Attended by:

Goals Set for [Year]