

INTRODUCTION OF CAMA'S CAO PERFORMANCE EVALUATION TOOLKIT

**Janice Baker, Chair of CAO Performance
Evaluation Taskforce
CAMA Board Representative for Ontario**

TASKFORCE MEMBERS

- ▶ Don MacLellan, General Manager of Community Safety Services, City of Moncton, NB (CAMA President)
- ▶ Robert Hughes, CAO, Town of Stratford, PEI (CAMA Past President)
- ▶ Patrick Draper, City Manager, City of St. Albert, AB (CAMA Member)
- ▶ Scott Barton, CAO, Town of Raymond, AB (CAMA Member)
- ▶ Former Committee Members:
 - ▶ Donald Hrynyk, Former Director of City Manager's Office, City of Calgary
 - ▶ Jason Gariepy, Former CAO of the Village of Thorsby, AB

Assisted by:

- ▶ Jennifer Goodine, Executive Director CAMA
- ▶ Nancy Mackenzie



WHY DID CAMA DECIDE TO DO THE PROJECT?

- ▶ Members have long raised concerns that the process does not happen, or is not done well in their municipality
- ▶ CAMA's toolkit was produced in recognition of the importance of fostering a professional and respectful relationship between the CAO (City Manager; Town Manager,) and Mayor and Council (which is also a strategic objective of our Association).
- ▶ We saw a gap that we could fill and add value for our members

CAMA'S PROCESS

- ▶ Taskforce formed in May 2014.
- ▶ In the Fall of 2014, CAMA distributed a survey to its membership to better understand the current state of performance management.
- ▶ Responses were received from 82 CAOs.
- ▶ Discussions held with FCM, ICMA and HR Associations.

CAMA'S PROCESS

- ▶ A similar survey was then distributed to elected officials with the assistance of FCM in January 2015.
- ▶ There were 114 random responses received from Mayors/Council members.
- ▶ Tremendous level of alignment between what was heard from both sides and what CAMA could do to help.

CAO SURVEY RESULTS HIGHLIGHTS

- ▶ 79% of CAOs have a formal performance management process.
- ▶ 61% of CAOs have annual goals, objectives and targets.
- ▶ Only 25% of newly hired CAOs strongly agreed they had clear performance expectations when they were hired.
- ▶ 95% said the main purpose of the performance evaluation was to identify areas for improvement
- ▶ Only 30% of CAOs strongly agreed that they are rated on actual results.

ELECTED OFFICIAL'S RESULTS HIGHLIGHTS

- ▶ 89% conduct CAO performance evaluations.
- ▶ 76% report that all members of Council participate.
- ▶ 67% have a formal process however, less than half felt their process was completely followed.
- ▶ Only 43% felt well prepared for the process.
- ▶ 44% had templates that were described as very helpful.
- ▶ 65% said CAO performance was linked or strongly linked to Council's strategic plan, goals, and priorities

WHAT'S THE ONE THING CAMA CAN DO

- ▶ There was significant alignment in what we heard
- ▶ You and your Elected Officials asked that CAMA to take a lead role and establish a standardized, performance evaluation system that facilitates the performance evaluation process by providing recognized and acceptable performance evaluation practices from municipalities across Canada.

BUILDING THE TOOLKIT

- ▶ In March 2015 a call for performance evaluation best practices was made to the membership.
- ▶ The Committee reviewed 34 responses that were received from CAMA members across the country including templates, bylaws, policies and procedures.
- ▶ We are also grateful to George Cuff, Conroy Ross and ICMA among others who contributed material
- ▶ These inputs were used in the creation of the toolkit.

COMPILATION & PILOT PHASE

- ▶ RFP was issued to hire a professional writer in October 2015 with Bronze Horse Communications being the successful bidder.
- ▶ During the six month period (October 2015 to March 2016) the Taskforce worked on several drafts of the toolkit.

Pilot:

- ▶ A draft of the Toolkit was piloted and tested in March 2016 by about 20 member municipalities and some of their elected officials.
- ▶ The feedback received was very positive.

WHAT'S IN THE TOOLKIT

FOR CAOS

- ▶ This Toolkit empowers CAOs with a process that uses strategies and templates they can share with the Mayor and Council to ensure goals, core competencies, performance measures and a process rooted in best practice are mutually understood and agreed on.

FOR MAYOR AND COUNCIL

- ▶ This Toolkit serves to inform Mayor and Council of the value of CAO performance conversations, and to offer a process for them to fairly conduct the performance evaluations.

WHAT'S IN THE TOOLKIT

For both parties, the Toolkit fosters:

- ▶ a foundation for good communication;
- ▶ an approach to dialogue and conversation that reduces misunderstandings;
- ▶ A process to set annual work-related goals and performance measures;
- ▶ a recognition of the CAO's achievements and assessment of what is being accomplished;
- ▶ an identification of performance gaps and setting in place proactive measures to close them;
- ▶ a focus on aligning the CAO's goals with the strategic plan for the organization.

WHAT'S IN THE TOOLKIT

- ▶ A comprehensive document “How-To”
- ▶ A Quick reference Guide
- ▶ A sample e-mail and one-page “marketing” document for the CAO to send to Mayor/Council summarizing the steps, why it's important, and encouraging them to use it.
- ▶ Evaluation templates
- ▶ A number of helpful aides and sample documents

WHERE CAN I FIND THE TOOLKIT?

Phase One

- ▶ In the CAMA Member's Section on the Website for the first year.
- ▶ CAMA will continue to seek feedback on the toolkit as municipalities begin to use it.
- ▶ The translation will be completed this Summer.

Phase Two

- ▶ Once the year pilot is complete and the toolkit is updated based on member feedback then it will be public on the CAMA website in June 2017.
- ▶ A Communications Plan will be developed to promote this document to the elected officials and non-member CAOs.

PUBLIC COMMUNICATIONS PLAN

Marketing and Education Ideas:

- ▶ Information Session at the 2017 FCM Conference.
- ▶ Provide the toolkit on USB keys for all Mayors in Canada after municipal elections.
- ▶ Promote to the Administrator and Elected Officials: Provincial/Territorial Associations.
- ▶ Links on websites

