# 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: | | |
| **Part 1: CAO Gathers information to create the CAO *Handbook for Performance Evaluation*** | | |
| 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?  List of Goals: | Yes | No |
| 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*: | | |
| *Final Performance Evaluation Report* 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] | | |