# Appendix 3: CAO Process Checklist

**Recommendations for CAO Performance Evaluation**

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

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| 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-assessmentTo be completed by: (date) | Yes | No |
| Mayor and Council Evaluation Timelines are setThese 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] |