

POLICY STATEMENT AND REGULATIONS

Number: 800.20

CHIEF ADMINISTRATIVE OFFICER PERFORMANCE APPRAISAL

Council may at its pleasure provide performance reviews of the Chief Administrative Officer utilizing this or another format.

Adopted: November 10, 2014



DISTRICT OF SUMMERLAND
Performance Appraisal of the Chief Administrative Officer

© George B. Cuff & Associates Ltd.

Name: _____
Date Appointed to Position: _____
Date of Appraisal Meeting: _____
Current Salary: _____
Date of Last Revision: _____

Purpose of Performance Evaluation

The performance evaluation of a CAO can serve any or all of the following purposes:

1. To ensure that there is clarity with regard to the position expectations of the CAO.
2. To formally discuss the relationship which should (and does) exist between the Council and administration of the District of Summerland and its Chief Administrative Officer.
3. To relate performance to the role, responsibilities, authority and duties as defined.
4. To set objectives and criteria for future evaluation.
5. To recognize strengths and weaknesses and reward or correct.
6. To serve as a basis for salary adjustment.

Performance Evaluation Content

A review of the CAO's performance should embrace a number of areas. These include the following:

1. Leadership style
2. Relationship to Mayor and Councillors
3. Relationship to Senior Management
4. Leadership to the organizations
5. Relationships to key publics
6. Accomplishment of goals
7. Areas for improvement

Performance Evaluation Form for the Position of the CAO

Rate each factor according to your perception of the performance of the CAO in the past year.

RATING CRITERIA

1. Outstanding
2. Above Average
3. Satisfactory
4. Needs Improvement

Provide narrative comments or examples to illustrate.

I. Leadership Style

- a) Strength of administrative leadership as observed in terms of the CAO's decision-making ability (e.g. decisiveness, quality of decisions).

Rating: _____

Comments

- b) Quality of policy advice, guidance and direction given Council for the development of its decisions and policies.

Rating: _____

Comments:

- c) Approachability; responsiveness to the feedback and input received from members of Council, ability to identify and communicate to Council issues or areas of concern impacting Council's relationship to the administration.

Rating: _____

Comments:

- d) Is comfortable suggesting new initiatives; able to review the current state of affairs and recommend positive improvements.

Rating: _____

Comments:

II. Relationship with the Mayor and Council

- a) Understanding of the Council's mandate and responsibilities in relation to that of the CAO' ability to respond quickly and appropriately to the direction of Council.

Rating: _____

Comments:

- b) Communicates frequently with the Mayor; provides support for the Mayor in terms of briefings and office assistance; ensures that the Mayor is made aware of upcoming key issues.

Rating: _____

Comments:

- c) Ensures that there is an ongoing degree of open communication with Council; ability to present reasonable and professional views in a straight forward yet pleasant manner.

Ratings: _____

Comments:

- d) Has the respect of members of Council and shows respect for them and their decisions.

Rating: _____

Comments:

III. Relationship to Senior Management

- a) Ensures that senior staff is involved in the process of developing District goals and priorities; provides a forum for Council and senior staff to engage in discussions relative to the strategic plan.

Rating: _____

Comments:

- b) Delegates appropriate responsibilities and authority to department heads.

Rating: _____

Comments:

- c) Understands the role of a CAO; performs as the administrative team leader.

Rating: _____

Comments: _____

- d) Provides good leadership to department heads and through them to the full administration; communicates effectively and regularly; senses the need for direction and provides a good example.

Rating: _____

Comments: _____

IV. Leadership to the Organization

- a) Provides effective leadership to his staff; enables them to be successful in the guidance of their departments.

Rating: _____

Comments: _____

- b) Involves the administration in the development of a comprehensive business planning process.

Rating: _____

Comments: _____

c) Ensures that he acts in a supportive manner to his senior staff.

Rating: _____

Comments: _____

d) Is visible throughout the organization; creates an “open door” atmosphere.

Rating: _____

Comments: _____

V. *Relationship to Key Publics*

a) Has developed a growing network of colleagues in the surrounding communities and throughout the Province.

Rating: _____

Comments: _____

b) Is respected by his colleagues in the community (i.e. the heads of other allied organizations, Chamber of Commerce, School Board, Library, Police, Regional Districts, etc.)

Rating: _____

Comments: _____

c) Is well-received by the public; feels comfortable fielding their calls and complaints; is working towards improving his image in the community.

Rating: _____

Comments:

VI. *Accomplishment of Goals*

- a) Participates in the development of annual priorities with Council and senior management; identifies new initiatives for Council to consider.

Rating: _____

Comments:

- b) Ensures that he has a clear mandate to achieve certain objectives on behalf of Council.

Rating: _____

Comments:

- c) Is comfortable working in a collegial fashion with his senior colleagues in identifying and accomplishing the priorities of Council; able to provide leadership to staff in their departmental business planning.

Rating: _____

Comments:

VII. Areas for Improvement (if applicable)

1. Policy advice to Council

2. Understanding of the role of CAO

3. Development of a solid senior management team

4. Leadership to the business planning and budget processes

5. Relationship to the Mayor and Councillors

6. Approachability

7. Relationship to the rest of the organization

8. Accomplishment of goals/project

9. Customer Service

VIII. Key Areas for Improvement (if applicable)

1. Relationship to the governing body

2. Leadership vis-à-vis rest of the administration

3. Budgetary advice and control

4. Public Image

5. Development of new initiatives

6. Corporate planning

7. Management practices

8. Relationship to the community

9. Pursuit of approved objectives

IX. Objectives

These should be developed by the CAO and reviewed with the governing body.

Key Objectives	Results

Overall impression of performance and results achieved.

X. Follow Up

Indicate those measures or steps which should be taken by the CAO over the course of the next appraisal period to improve his/her performance, e.g. types of external or internal development course/seminars, changes in management practices, etc.

XI. Sign Off

Signature of the CAO (this indicates only that this appraisal has been discussed with you, not whether you agree or not with the comments/rating).

Signature of the CAO

Signature of the Mayor

