



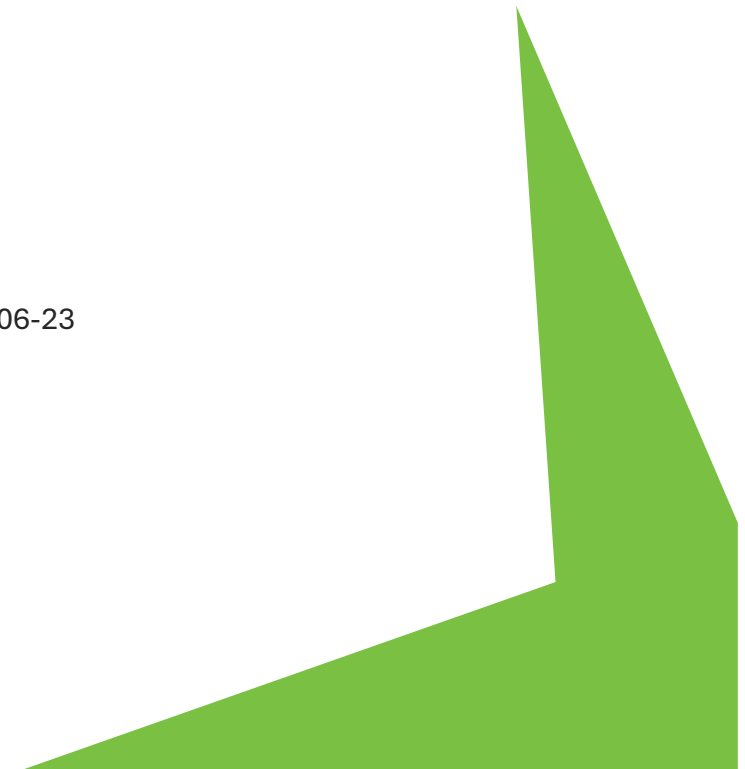
**FORTFRANCES**

**CHIEF ADMINISTRATIVE OFFICER  
PERFORMANCE APPRAISAL**

**HUMAN RESOURCES 3.33**

**POLICY**

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# CHIEF ADMINISTRATIVE OFFICER PERFORMANCE APPRAISAL

## PURPOSE

As per by-law no. 38-22, the CAO's performance is to be assessed by Council on an annual basis.

This policy provides detailed instructions for the steps involved in the CAO Performance Appraisal and performance evaluation process approved by Council.

## RATIONALE

A key responsibility of the Council is to oversee the efficient management of municipal affairs through the Chief Administrative Officer (CAO). The CAO acts as the link between the Council and municipal operations, responsible for the development, execution, and provision of municipal programs and services according to the Council's guidance. As the only position directly appointed by the Council, it also holds the responsibility of assessing the performance of the CAO.

## 1. RESPONSIBILITIES

1. Chief Administrative Officer - The CAO is tasked with preparing a self-assessment based on the Performance Evaluation Form (appendix A). The CAO should also make use of relevant documents compiled during the year that relate to the assessment, including progress updates. After completing the self-assessment, the CAO will forward it to the Council, along with any relevant documents that the CAO finds appropriate for the review.
2. Council - The Performance Evaluation Form and related tools will be distributed to each Council member for individual completion. Full participation is crucial. Council members will use the definitions in the performance review tool to assign numerical scores, which are detailed in the performance rating tool. Brief comments can be added to justify each score.
3. Human Resources Manager - The Human Resource Manager oversees the entire process, which includes supporting the Council and CAO, monitoring and improving performance reviews, and integrating formal systems like Performance Appraisals into professional development and compensation frameworks.

## 2. PERFORMANCE REVIEW PROCESS

The CAO Performance Review will take place in-camera during the Regular Council meeting. All aspects of the review must be finalized by the CAO's employment anniversary date.

Things to note:

- In an election year, the outgoing Council evaluates the CAO's performance over the prior year before the new Council is elected.
- The CAO will already have performance goals/key objectives in place to share with a newly elected Town Council in the first year of their term.
- The new Council may use the Mid-Year Check In as a way to fine-tune the performance goals/key objectives of the CAO.
- The first time the new Council evaluates the CAO is one year after it has been elected.

### 3. CAO REVIEW PROCESS

#### **Step 1: Objectives and Goal Setting**

At the beginning of the performance cycle, goals will be established to align with the Town's Strategic Plan and/or annual work plans. This process will involve collaboration between the CAO and Council, including the identification and development of professional development goals where applicable, and will take place during a closed session meeting. The performance cycle is defined as the calendar year.

The performance objectives should be crafted using the S.M.A.R.T. goal framework (Specific, Measurable, Assignable, Realistic, Time-related).

#### **Step 2: Mid-Year Check In (optional)**

Council and the CAO meet to discuss the progress on achieving critical objectives and to determine if there are any challenges to success, or if objectives require modification due to a change in strategic direction or priority.

#### **Step 3: Annual Performance Review**

##### CAO:

The CAO prepares a self-assessment of goals, key performance objectives, and accomplishments for the year as well as gathers data from community surveys/feedback and employee surveys/feedback that reflect the satisfaction and well-being of our community and our workforce and provides it to the Mayor.

Mayor/Council: Each Council member completes the CAO Performance Review form (Appendix B) individually and forwards it to the Mayor. The Mayor then shares this with the Human Resources Manager, who collates all feedback into a summary document.

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Mayor/Council identifies groups requiring confidential surveys for the purpose of the annual performance review and provides direction to the Human Resources Manager regarding the administration of such surveys.

## Human Resources Manager:

Human Resources prepares and administers confidential surveys of the Senior Leadership Team, any other members of the of the Town's workforce, or external stakeholders identified for each annual performance review. Results of these surveys are provided to the Mayor.

## Pre-Performance Review Meeting

The Human Resources Manager collates all information gathered from the CAO, Council, and Senior Leadership Team and holds a formal meeting with Council to discuss the results of the review and the level of success in achieving the key objectives. Council feedback is documented for provision to the CAO. Council also determines any salary adjustment based on overall performance.

## Performance Review Meeting:

The Mayor and Council meets with the CAO to provide formal, documented feedback as gathered above and to communicate Councils compensation adjustment decision.

Step 4: Cycle repeats with Step 1.

## 4. DETAILED ANNUAL PERFORMANCE REVIEW SCHEDULE

**The CAO Annual Performance Review shall be completed up to 10 weeks before the CAO's employment anniversary date.**

DELIVERABLE	WHO	Deadline to complete
Develop and send out surveys for direct reports and/or others	HR	8 weeks
Advise CAO to complete self-assessment	HR	6 weeks
Provide performance review form to Council members to complete the performance review document for the CAO	HR	6 weeks
Each Council member will individually complete the performance review document for the CAO and submit to the Mayor	Council Members	6 weeks

## HUMAN RESOURCES

Complete self-assessment of goals, key performance objectives, and accomplishments, plus gather data from employee or community surveys or feedback	CAO	6 weeks
Collate and summarize Council feedback; collate all other information gathered and send to Council for review	Mayor/HR	4 weeks
Meet to discuss CAO review and provide overall feedback; decide on salary adjustment	Mayor and Council	2 weeks
Summarize all feedback from Council into CAO performance review document	Mayor/HR	2 weeks
Meet with CAO to deliver feedback	Mayor and Council	1 week
Advise HR to process salary adjustment as per contract and Salary Administration Policy for the CAO	Mayor	1 week
Develop key performance objectives for upcoming year	CAO, Mayor, and Council	1 week
Share and discuss key performance objectives for coming year with Council; finalize	CAO, Mayor, and Council	1 week
Mid-year check in (if used)	CAO, Mayor and Council	

### 5. PERFORMANCE REVIEW MEETING

The performance review meeting is to be held in an in-camera session and should include the CAO, all members of Council, HR Manager and Clerk or designate.

The meeting should facilitate a dialogue on the CAO's performance, highlighting achievements, improvement areas, and growth opportunities. Both the CAO and Council should use this meeting to strengthen their relationship and discuss new performance objectives for the upcoming cycle. Participants should come prepared with strategic goals that align the CAO's objectives with the Council's priorities.

The performance review will be signed by the Mayor and CAO, then forwarded to the Human Resources Manager for compensation adjustments and kept in the CAO's employee file.