



**APPENDIX E
Policy Overview**

Administrative Procedure No:	CAP – 17
Policy:	Annual CAO Performance Review
Effective:	March 1, 2024
Revised:	October 2024
Current Legislation:	
Applicable to:	Chief Administrative Officer

9.1 PURPOSE

Formal performance development reviews are required for all employees of the Corporation. The following procedure outline the annual Chief Administrative Officer (CAO) performance development review process that occurs yearly.

9.2 REVIEW PROCESS

On an annual basis, the Chief Human Resources Officer (CHRO) initiates the CAO performance development review process in consultation with the Mayor.

- CHRO initiates the annual performance development review process for the CAO with the Mayor in October of each year.
- CHRO prepares performance appraisal documents for approval by Mayor, and then completion by CAO.
- CHRO prepares CAO Performance Evaluation Survey to be distributed to Mayor and all members of Council for completion.
- CHRO and Mayor assume accountability for process to begin CAO consultation and preparation for the annual performance appraisal process.

9.2.1 CAO is issued performance appraisal documents.

- CAO provided performance appraisal documents to complete first part of assessment process; completion of their self-assessment based on senior leader competencies, their annual objectives and development plan.
- CAO submits completed performance appraisal documents to CHRO by required submission date.

9.2.2 Council invited to participate in CAO performance development review.

- CHRO distributes CAO Performance Evaluation Survey to all members of Council.
- Members of Council complete CAO Performance Evaluation Survey and return to

CHRO by required submission date.

9.2.3 Direct Reports invited to participate in CAO performance development review.

- CHRO distributes CAO Direct Report Survey to all direct reports of the CAO.
- CAO direct reports complete CAO Direct Report Survey and return to CHRO by required submission date.
- CHRO reviews all documentation and creates performance appraisal feedback report to Council.
- Reviews Council feedback provided in CAO Performance Evaluation Survey that contain aggregated results and comments summary.
- Reviews CAO submission of performance appraisal documents.
- Reviews CAO Direct Report Survey feedback.
- Prepares a report summarizing the feedback of Council, direct reports and the CAO for discussion at a closed meeting.

9.2.4 CHRO and Mayor meet with Council to review the CAO performance appraisal feedback report.

- Report based on Council CAO Performance Evaluation survey, the CAO self-appraisal, direct report feedback, and any additional feedback.
- The discussion should center around:
 - How well did the CAO's performance align with Council's strategic priorities.
 - How well did CAO's performance align with annual objectives?
 - What themes or key discussion points emerged?
 - Is there a recommendation for performance development planning for next cycle?
 - What is the final performance rating, and should the CAO review a merit-based increase?
- The performance goals for the upcoming year should be finalized during this meeting.

9.2.5 CHRO and Mayor meets with the CAO to review the CAO performance appraisal report.

- Mayor and CAO engage in feedback discussion regarding performance development review and the goals for the upcoming year.
- Once discussion(s) are complete, sign off by the CAO and Mayor will occur and the performance development review forms will be stored in the CAO's employee file in the Human Resources Department.

9.3 MID-YEAR CHECK IN

A mid year check must occur in June or July of each year. The purpose of this meeting is for the CAO to provide an update on his/her progress on the assigned goals, and for discussion between Council, the Mayor and the CAO regarding the CAO's progress and performance.