



# **FORTFRANCES**

## **BOUNDLESS**

**CHIEF ADMINISTRATIVE  
PERFORMANCE APPRAISAL  
HUMAN RESOURCES 3.33**

**OFFICER**

## **POLICY**

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# CHIEF ADMINISTRATIVE OFFICER PERFORMANCE APPRAISAL

## 1. PURPOSE

The Town of Fort Frances (the Town) recognizes the need to evaluate the performance of its Chief Administrative Officer (CAO) to ensure the ongoing success of the Town. Performance of the CAO will be monitored at a frequency as outlined in the policy and by a method determined by Council.

## 2. RATIONALE

In an environment characterized by change due to the municipal election process, this policy will ensure consistency in the CAO performance management process over time. A key role of Council is to evaluate the performance of the CAO. To be effective, this evaluation needs to be carried out on regular basis, and in a planned and thoughtful manner.

The CAO is accountable for their performance and entitled to know what is expected of them, how they are performing, and what resources are available to improve their performance. The performance review process provides the vehicle to establish and maintain open dialogue between the Council and the CAO for the purpose of providing feedback to improve personal and professional performance.

## 3. RESPONSIBILITIES

### 1. Chief Administrative Officer

The CAO is responsible for their own performance and development within the context of the organization's business needs. More specifically, those responsibilities are:

- Set challenging but achievable performance objectives based on the strategic direction for the Town.
- Prioritize issues that concern the Town of Fort Frances.
- Evaluate and assess their progress and develop strategies to overcome obstacles.
- Deliver on their objectives and plans.

### 2. Council

Council represents the community and outlines what is expected of the CAO as leader of Administration. More specifically:

- Ensure the goals and objectives of the CAO and the organization are aligned with the strategic direction of the Town.
- Support the CAO and the organization so they get the resources they need to achieve success.
- Recognize progress and achievements of the CAO through informal discussion, Mid-Year Check-In (optional) and/or Performance Reviews.
- Review and approve any revisions to this policy.

### 3. Human Resources Manager

The Human Resource Manager is the custodian of the process. The Human Resources Manager's responsibilities are to:

- Provide assistance to Council and the CAO throughout the process.
- Monitor, evaluate, and improve the performance review processes on a regular basis.
- Integrate related formal systems and procedures, like the Performance Appraisal process, into the professional development and compensation processes.

## 4. PERFORMANCE REVIEW PROCESS

### PERFORMANCE REVIEW TIMELINES:

The CAO Performance Review is scheduled in September of each year. All components of the review, including any salary adjustment will be completed by September 30.

This means that:

- 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-point evaluation as a way to fine-tune the performance goals/key objectives of the CAO.

# CHIEF ADMINISTRATIVE OFFICER PERFORMANCE APPRAISAL

## CAO REVIEW PROCESS:

### Step 1: Objectives and Goal Setting

The purpose of this step is for the CAO and Council to jointly decide on any personal development goals and establish key performance objectives that are tied to the annual performance review feedback. These objectives should be established with the overall context for the Strategic Plan for the Town of Fort Frances.

Goals are established on annual performance review feedback, Town priorities, initiatives, and direction for the coming year.

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

Council and the CAO meet to discuss progress on the achievement of key objectives and determine if there are any impediments to success or if objectives need to change as a result of a shift in strategic direction or priority.

### Step 3: Annual Performance Review

#### CAO

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 individually and forwards it to the Mayor. The Mayor then collates all feedback into a summary document.

Mayor/Council identifies groups requiring confidential surveys for the purpose of the annual performance review and provides direction to 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

Human Resources collates all information gathered from the CAO, Council, and HR, 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.

## Detailed Annual Performance Review Schedule

DELIVERABLE	WHO	Deadline
Send reminder of CAO review timelines to Mayor	HR	July 2
Meet with Council to discuss components of evaluation (i.e. feedback, survey of direct reports, evaluation tools, etc.)	Mayor	July 15
Meet with Mayor to discuss components of evaluation (i.e. feedback, survey of direct reports, evaluation tools, etc.)	HR	July 25
Develop and send out surveys for direct reports and/or others	HR	August 1
Advise CAO to complete self-assessment	HR	August 1
Provide performance review form to Council members	HR	August 1
Each Council member will individually complete the CAO performance review document and submit to the Mayor	Council Members	August 15
Complete self-assessment of goals, key performance objectives, and accomplishments, plus gather data from employee or community surveys or feedback	CAO	August 15
Collate and summarize Council feedback; collate all other information gathered and send to Council for review	Mayor/HR	August 20
Meet to discuss CAO review and provide overall feedback; decide on salary adjustment	Mayor and Council	September 1

## CHIEF ADMINISTRATIVE OFFICER PERFORMANCE APPRAISAL

Summarize all feedback from Council into CAO performance review document	Mayor/HR	September 10
Meet with CAO to deliver feedback	Mayor and Council	September 15
Advise HR to process salary adjustment as per contract and Salary Administration Policy for the CAO	Mayor	September 15
Develop key performance objectives for upcoming year	CAO, Mayor, and Council	September 15
Share and discuss key performance objectives for coming year with Council; finalize	CAO, Mayor, and Council	September 15
Mid-year check in (if used)	CAO, Mayor and Council	March 30