



## **Township of Southgate**

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### **CAO – ANNUAL PERFORMANCE REVIEW POLICY**

#### **Policy Statement**

A primary function of Council is to ensure the effective management of the affairs of the Corporation of the Township of Southgate. The township's model of administration follows the Municipal Act in the establishment of the Chief Administrative Officer (CAO) position as the head of the administrative branch of the local government. The CAO is the only direct employee of Council who provide direction on the administration, plans, policies, and programs of the municipality. The CAO is the connecting link between Council and municipal operations.

#### **Purpose & Scope**

The annual performance review is part of an ongoing process by which Council and the CAO work together to plan, monitor and review the objectives and overall contributions to the organization. This is part of a continuous process of setting goals, assessing progress and providing on-going feedback. The annual review of the CAO's performance should include the development of measurable criteria that:

- Align with the Township's strategic direction;
- Are practical and easy to understand and use;
- Provide an accurate picture of expectations and performance;
- Include a collaborative process for setting goals and reviewing performance based on two way communication between Council and CAO;
- Monitor and measure results (what) and behaviours (how);
- Identify and recognize accomplishments; and
- Supports the administrative decision-making process.

This policy applies to the Chief Administrative Officer as the only direct employee of Council.

In consultation with the CAO and/or external human resource consulting resources, Council will oversee the process for establishing annual objectives for the CAO. The Canadian Association of Municipal Administrators (CAMA) CAO Competencies will provide guidance to the process and Township specific objectives will be developed based on the CAO job description, and the Township Strategic Plan, and will serve as the basis for the feedback form (see Schedule 1).



### Schedule 1

## **CAMA CAO Competencies**

1. Promotes the development and performance of staff and employees throughout the organization.
2. Helps elected officials and other community actors identify, work toward, and achieve common goals.
3. Service delivery management - maintains a consistently high level of quality in staff work, operational procedures, and service delivery.
4. Functional and operational expertise and planning.
5. Strategic leadership - sets an example that urges the organization and the community toward experimentation, change, creative problem solving, and prompt action.
6. Democratic advocacy and citizen participation - demonstrates a commitment to democratic principles by respecting elected officials, community interest groups, and the decision-making process.
7. Diversity - understands and values the differences among individuals and fosters these values throughout the organization.
8. Strategic planning - positions the organization and the community for events and circumstances that are anticipated in the future.
9. Advocacy and interpersonal communication - facilitates the flow of ideas, information, and understanding between and among individuals.
10. Presentation skills- conveys ideas or information effectively to others.
11. Media relations- communicates information to the media in a way that increases public understanding of local government issues and activities.
12. Integrity - Demonstrates fairness, honesty, and ethical and legal awareness in personal and professional relationships and activities.



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### Schedule 2

## **Annual Performance Review Process and Timeline**

The CAO performance Review is scheduled in October of each year. All components of the review will be completed by October 31st.

This means that:

1. In an election year, the outgoing Council evaluates the CAO's performance over the prior year before the new Council is elected.
2. The CAO will already have performance goals/key objectives in place to share with a newly elected Council in the first year of their term.
3. The incoming Council may choose to fine-tune the performance goals/key objectives of the CAO for that year.
4. The first time the new Council evaluates the CAO is one year following their election.

### **CAO Review Process**

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

CAO meets with Senior Management and determines key performance objectives and goals for the upcoming year, in line with the strategic plan/priorities of the Township.

#### **Step 2: Mid – Year Check In**

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 resulting from a shift in strategic direction or priority.

#### **Step 3: Annual Performance Review (see detailed schedule below)**

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

**Council** - Each member completes the performance review form individually and forwards to the Mayor.

**External HR Consultant (optional)** – If required, the external HR consultant prepares and administers confidential surveys of the Senior Management Team, other members of Council, or key stakeholders. Results of any surveys are provided to the CAO and members of the Council.

**Consolidation of Feedback** – The Mayor collates all information gathered from the CAO, Council Members, and external consultant (if required). The collated information is provided to the CAO (Mayor meets with CAO) and Council prior to the Performance Review Meeting.



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### **Performance Review Meeting**

Council meets with the CAO. Recommendations regarding changes to the CAO job description, employment terms or compensation outside of the market check/COLA process are prepared for Council consideration.

### **Annual Performance Review Timeline**

<b>TASKS</b>	<b>WHO</b>	<b>DATE</b>
Develop key performance objectives for the coming year, tied to strategic plan/priorities	CAO, Senior Management Team	November
Discuss key performance objectives for coming year with Council, finalize.	CAO/Council	November/December
Mid-year check in <ul style="list-style-type: none"><li>- Discuss progress to date of objectives, determine any course correction or remedial action.</li><li>- Determine if council wishes to engage external HR consultant.</li></ul>	CAO/Council	May/June
CAO self-assessment, Council members prepare individual assessments and provide to the Mayor.	Council	September
Mayor meets with CAO to deliver feedback and discuss recommendations for the future.	Mayor/CAO	October
Performance Review Meeting	Council/CAO	October