



Staff Report to Council - for Direction

Title: CAO Performance Evaluation Policy

From: Jenn Robinson, Director of Human Resources

Date: May 16, 2024

Staff Recommendation:

That Council approve the CAO Performance Evaluation Policy; and

That Council approve the 2024 Performance Review Timeline

Report Summary:

As per by-law 2023-041, the CAO's performance is to be assessed by Council on an annual basis. A formal policy or procedure does not currently exist that defines Bruce County's CAO performance evaluation process. To ensure that the CAO's performance is measured in a consistent and equitable manner and promotes accountability in line with Council priorities, the attached CAO Performance Evaluation Policy has been created.

The Striking Committee endorsed the policy and the 2024 performance review timeline on May 2, 2024.

Background:

The Performance Evaluation policy has been developed with guidance from the Canadian association of Municipal Administrators (CAMA) CAO Performance Evaluation Toolkit. The toolkit was updated in 2023 to provide best practice guidance on creating an effective process for Council to document the annual performance of the CAO which is collaborative and transparent.

The creation of this process fosters:

- A foundation for good communication
- An approach to dialogue and conversation that reduces misunderstandings
- A process for setting annual work-related goals
- A shared understanding of performance measurement
- A documented process for recognition of the CAO's achievements and assessment of what is being accomplished
- An identification of performance gaps and proactive measures
- A focus on aligning the CAO's goals with the strategic plan for the organization

The performance evaluation process navigates away from methodology using a rating scale and instead is based on communicated performance goals and development objectives. This

model of performance evaluation has been utilized with Bruce County staff since 2023 and has provided improvements to our staff performance review process through fostering open communication and clearly communicating performance expectations. The format ensures that the performance evaluation is based on tangible goals which are aligned with the strategic plan and endorsed as council priorities.

This process provides an opportunity for feedback from Council in the following areas:

- Performance Goals
 - Goals developed based on Council’s priorities, the strategic plan, business plans and CAO specific objectives
- Development Objectives
 - Objectives specific to the CAO regarding professional development and/or training opportunities
- Core Review Elements
 - Annual leadership expectations of the CAO
- Council Reflection
 - An opportunity for Council to comment on CAO strengths, areas for improvement, identified performance goals/development objectives for next review period, and overall satisfaction with performance

The Performance Review Cycle:



2024 Performance Review Timelines:

With 2024 being an introductory year for the CAO Performance Evaluation process, a preliminary performance evaluation is suggested to be completed for Q2. The preliminary performance evaluation would gather Council feedback specific to the core review elements and reflection sections of the performance evaluation. The feedback will be important to set an introductory baseline. A goal setting and development objective exercise will also be part of the preliminary process, which will create measurable goals/objectives for the 2024 final performance evaluation to be based on.

Q2

- Director, Human Resources develop and circulate electronic council feedback survey specific to core review elements and reflection sections of the performance evaluation
- Striking Committee collate Council feedback
- Warden meet with CAO to discuss the preliminary performance evaluation. Warden and CAO formulate performance goals and development objectives for 2024 which will be the basis for the final year end evaluation
- Striking Committee meet to approve the annual performance goals and development objectives
- Communicate CAO performance goals and development objectives to Council

Q4

- Complete the final 2024 performance evaluation process and timeline following the suggested timeline within Appendix A of the CAO Performance Evaluation Policy

Financial/Staffing/Legal/IT Considerations:

There are no additional costs associated with the CAO Performance Evaluation Process.

Interdepartmental Consultation:

The Office of the CAO and the Striking Committee have been consulted in developing the CAO Performance Evaluation Process.

Link to Strategic Goals and Objectives:

Culture and Capacity - Ensure a positive, inclusive and accountable work culture

Link to Departmental Plan Goals and Objectives, if any:

Report Author:

Jenn Robinson - Director, Human Resources

Departmental Approval:

Approved for Submission:

Sean Morphy, Deputy Chief Administrative Officer