

MUNICIPALITY OF THE DISTRICT OF BARRINGTON <b>POLICY AND ADMINISTRATION MANUAL</b>	REFERENCE NUMBER _____ 11
SECTION <b>ADMINISTRATION</b>	SUBJECT <b>PERFORMANCE EVALUATION</b>

## 1. APPLICATION

1.1. This policy applies to all permanent employees of the Municipality.

## 2. PURPOSE

2.1. The purpose of this policy is to:

- a) establish a process whereby the ~~work~~ performance of each employee in the municipality ~~can~~ **shall** be evaluated on an on-going basis
- ~~b) provide for an annual formal review of each employee's work performance~~
- c) encourage employees to continually consider their own ~~work~~ performance and to set personal performance standards and goals
- d) assist in identifying specific requirements for the on-going training and development of individual employees
- e) ~~encourage the use of~~ a performance evaluation system as a means of determining whether or not salary adjustments are warranted

## 3. RESPONSIBILITIES

3.1. The Council is responsible for:

- a) initial approval of this policy and for approving any future changes or amendments that may be made in content or direction;
- b) carrying out the annual performance evaluation of the Chief Administrative Officer in accordance with a process that has been approved by Council. See Appendix "A", attached herewith.

3.2. The Chief Administrative Officer (or designate) is responsible for:

- a) overall implementation and maintenance of the Performance Evaluation Policy;
- b) monitoring effectiveness of the performance evaluation process and recommending necessary additions, deletions, or modifications to the Policy where considered appropriate;
- c) conducting informal and formal performance evaluations. The informal approach will be an ongoing process whereby the Chief Administrative Officer and supervisory employees provide continuous feedback to those individuals for whom they are directly responsible.
- d) The formal approach will involve at least one performance review for each municipal employee, conducted ~~at specific times on an annual basis~~ **annually during the month of September**. The reviews will be formally documented by way of using the Employee Performance Evaluation Form. See Appendix "B", attached herewith.

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#### 4. GENERAL PROCEDURE

4.1. Employees will be made aware of the performance evaluation process.

4.2. Approximately two months prior to the completion of an employee's probationary period, the supervisor (in consultation with the employee) will complete a probationary performance evaluation report.

4.3. In the case of the Chief Administrative Officer, Council in consultation with the CAO will complete the performance evaluation report. The CAO should also be evaluated by senior management and possibly external colleagues to assist Council in their evaluation.

4.4. Annual Formal Evaluation:

a) Annually, during a ~~predetermined period of time~~ **the month of September**, the employee's supervisor will formally record a performance rating using the Employee Performance Evaluation Form adopted for use with this Policy.

b) The supervisor will discuss the employee's performance evaluation rating with the employee in order to reinforce an ongoing mutual understanding between the employee and the supervisor in terms of:

4.3.b.1. the duties, responsibilities, and requirements of the position, and expected performance level

4.3.b.2. weak areas in the employee's performance and means to address these areas of concern

4.3.b.3. positive aspects of the employee's performance and measures to maintain or further enhance these positive features

4.3.b.4. short-term work goals which the employee should attempt to achieve

4.3.b.5. long-term career objectives of the employee

c) The formal evaluation form will be signed by the employee and supervisor following the interview and discussion. A signed copy will be maintained by the Chief Administrative Officer in the employee's personnel file.

4.5. Appeals:

a) Employees who feel that their overall rating does not represent a true evaluation of their performance over the review period should try to resolve these differences with their supervisor.

b) If a satisfactory consensus cannot be reached between employee and supervisor, the employee shall be given the opportunity to express his or her concerns in writing and a copy of the written concerns shall be maintained in the employee's personnel file for any future eventuality.

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**4.6. Effect on Salary:**

- a) It is important that changes in salary/wage rates be related to the ongoing process of performance evaluation:

4.6.a.1.1. Employees receiving a satisfactory evaluation rating will be eligible for annual salary increments that may be approved by the Chief Administrative Officer based on salary scales.

4.6.a.2. Employees receiving an unsatisfactory evaluation rating will not be eligible for a salary increment until such time as the employee (s) supervisor is of the opinion that the employee has addressed the evaluation concerns and there has been a noticeable positive change in the performance of the employee. The salary adjustment will be subject to approval of the Chief Administrative Officer and may be pro-rated according to the months remaining in the fiscal year.

**4.7. Retention of Performance Evaluation Records:**

- a) Following completion (including signatures), one copy of the evaluation shall be placed in the employee's personnel file and a copy shall be given to the employee.

**4.8. Definitions of Rating:**

- a) **Unacceptable** is as the term implies
- b) **Needs Improvement** is that level of performance that consistently falls below the requirements of the job. It does not mean that every aspect of the individual's performance is below adequate standards but that, in general, the employee does not meet the minimum requirements.
- c) **Meets Expectations** is that level of performance that is considered adequate to meet the requirements of the job. Some day-to-day variation is to be expected and may range, on occasion, from poor to very good. For the most part, however, meets expectations performance would be neither below the required level, nor consistently superior to the required standards.
- d) **Exceeds Expectations** will acknowledge a level of performance which is consistently above the norm that is expected in performance for the position.
- e) **Superior** refers to the demonstration of a level of on-the-job performance that is consistently superior in quality to that which would be normally expected of an employee



## Appendix “A” - **Chief Administrative Officer** Employee Annual Performance Review Form

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### Annual Performance Review Contents

The **CAO's** employee annual performance review is broken into various parts for ease of use and administration.

The CAO should also be evaluated by senior management and possibly external colleagues to assist Council in their evaluation.

**Part I:** Outlines the basic instructions to follow when completing the form. Part I also details the rating scale to use when assigning ratings for such things as job-specific behavioural competencies, as well as job criteria and corresponding duties and responsibilities.

**Part II:** Pertains to job-specific competencies. Competencies need to be determined by the **Council** immediate supervisor, and approved by the Chief Administrative Officer. **The** Each position should focus on 6-10 core competencies.

**Part III:** Includes job-specific criteria to assess in the review. The most effective way to assign job criteria is to look at the **CAO's** employee's job description and group main duties and responsibilities into more general job criteria.

Once criteria have been established, a question may be formed that encompasses what the criteria refer to. Once the criteria and question have been formed, the criteria can be broken down into more specific duties and responsibilities that are pertinent to the successful performance of the criteria.

**Council** Supervisors should ensure that the duties and responsibilities assigned to the criteria are accurate and relevant to the job, as these will be the areas that will have ratings assigned to them.

**Part IV:** Provides an area for **the CAO** employees and **Council** supervisors to set and evaluate a variety of goals to be accomplished throughout the review period. It is important to identify those areas of responsibility where the **CAO** employee did or did not meet performance goals or project milestones. In this section, you will also evaluate the progress made by the **CAO** employee on predetermined goals, projects, job duties, and special assignments.

**Part V:** Is the overall performance evaluation score. In this section, both the self-evaluation scores and the **Council** supervisor evaluation scores throughout the review are calculated. Taking both total scores, the **Council** supervisor must determine an overall rating for the **CAO's** employee's annual performance review score. This is done by averaging out the ratings throughout the review.

**Part VI:** Is the **CAO** employee signoff. It is imperative that **Council** the evaluating supervisor and **the CAO** employee meet to discuss the content and results of the annual performance review. Discussion of the review will provide an opportunity for the **CAO** employee and **Council** supervisor to discuss areas of achievement as well as areas requiring improvement. This discussion may also be used to facilitate the formation of goals and objectives for the upcoming performance period. Once **the CAO and Council** employee and supervisor have met to discuss the review, each should sign the review, indicating an understanding of its contents and implications, with a copy being given to the **CAO** employee and another to be kept in their file.

# Employee **CAO** Annual Performance Review

**CAO** Employee: \_\_\_\_\_

Position: \_\_\_\_\_

**Council** Supervisor: \_\_\_\_\_

Period of evaluation (for **Council** supervisor to fill in): From: \_\_\_\_\_  
To: \_\_\_\_\_

## Part I: Instructions

The **CAO's** employee annual performance review lists the behavioural competencies and job-specific criteria against which you must rank yourself, and be ranked by **Council** your immediate supervisor. The Municipality of the District of Barrington considers these performance factors to be critical to the success of personal, departmental, and municipal goals. The criteria listed in this evaluation should accurately reflect **the CAO's** employee's overall performance.

In each section, rate yourself according to the table below. Be sure to add comments, thoughts, and observations, as these are important to the evaluation process. Once all data have been collected, please submit to **Council** your immediate supervisor for review and for their evaluation. Please only fill out the section requiring **CAO** employee evaluation. Once completed by **the Council** your supervisor, a meeting will be scheduled to review the evaluation and determine objectives and goals for the upcoming performance period. Objectives and goals from the previous performance period will also be assessed at this time and will be factored into the annual performance review meeting.

At the conclusion of the annual performance review meeting, both supervisor and employee **Council and the CAO** will be required to sign and date the annual performance review, with a copy to be given to the **CAO** employee and one to be kept on the **CAO's** employee's file.

	Rating Scale
1	<b>Unacceptable:</b> Consistently fails to meet job duties and expectations, immediate and extensive improvement needed to meet job requirements.
2	<b>Needs Improvement:</b> Occasionally fails to meet job duties and expectations; considerable improvement needed to meet job requirements.
3	<b>Meets Expectations:</b> Performs job duties at a satisfactory level according to job description, under normal supervision and direction.
4	<b>Exceeds Expectations:</b> Often exceeds job requirements; consistently meets goals and objectives; accomplishments occasionally made in areas outside normal job role.
5	<b>Superior:</b> Consistently exceeds job requirements; top performer in all areas; frequently makes accomplishments in areas outside normal job role.

## Part II: Behavioural Competencies

<b>Accountability</b>		
Takes personal ownership and responsibility for the quality and timeliness of work commitments. Follows organizational guidelines, professional standards, regulations, and principles. Demonstrates reliability and integrity on a daily basis.		
	<b>Self-Evaluation</b>	<b>Council Supervisor- Evaluation</b>
<b>Unacceptable</b>	<b>1</b>	<b>1</b>
<b>Needs Improvement</b>	<b>2</b>	<b>2</b>
<b>Meets Expectations</b>	<b>3</b>	<b>3</b>
<b>Exceeds Expectations</b>	<b>4</b>	<b>4</b>
<b>Superior</b>	<b>5</b>	<b>5</b>
<b>CAO</b> Employee Comments:		
<b>Council Supervisor-</b> Comments:		

<b>Adaptability</b>		
Adapts and responds to changing conditions, priorities, technologies, and requirements. Recognizes new information and ideas with a willingness to alter opinions and behaviours. Applies versatility, reasoning, and innovativeness in the face of change. Able to comfortably collaborate in a variety of situations and with diverse individuals.		
	<b>Self-Evaluation</b>	<b>Council Supervisor- Evaluation</b>
<b>Unacceptable</b>	<b>1</b>	<b>1</b>
<b>Needs Improvement</b>	<b>2</b>	<b>2</b>
<b>Meets Expectations</b>	<b>3</b>	<b>3</b>
<b>Exceeds Expectations</b>	<b>4</b>	<b>4</b>
<b>Superior</b>	<b>5</b>	<b>5</b>
<b>CAO</b> Employee Comments:		
<b>Council Supervisor-</b> Comments:		

<b>Analytical Thinking</b>		
Applies systematic, logical reasoning when addressing problems or situations in order to arrive at an appropriate solution or outcome. Considers the various issues and components of the problem, develops sequential steps to address the situation, and determines rational timeframes and priorities.		
	<b>Self-Evaluation</b>	<b>Council Supervisor Evaluation</b>
<b>Unacceptable</b>	<b>1</b>	<b>1</b>
<b>Needs Improvement</b>	<b>2</b>	<b>2</b>
<b>Meets Expectations</b>	<b>3</b>	<b>3</b>
<b>Exceeds Expectations</b>	<b>4</b>	<b>4</b>
<b>Superior</b>	<b>5</b>	<b>5</b>
<b>CAO</b> Employee Comments:		
<b>Council Supervisor</b> Comments:		

<b>Communication</b>		
Expresses and transmits information with consistency and clarity. Uses active listening techniques in order to effectively understand and provided feedback. Summarizes information according to the audience in order to promote engagement and increase understanding.		
	<b>Self-Evaluation</b>	<b>Council Supervisor Evaluation</b>
<b>Unacceptable</b>	<b>1</b>	<b>1</b>
<b>Needs Improvement</b>	<b>2</b>	<b>2</b>
<b>Meets Expectations</b>	<b>3</b>	<b>3</b>
<b>Exceeds Expectations</b>	<b>4</b>	<b>4</b>
<b>Superior</b>	<b>5</b>	<b>5</b>
<b>CAO</b> Employee Comments:		
<b>Council Supervisor</b> Comments:		

<b>Critical Thinking</b>		
<p>Analyses and interprets data and information gathered from observation, investigations, formal and informal communication, reports, legislation, and others in order to develop conclusions. Reflects on past experience and organizational practices and processes in order to determine the correct course of action. Can analyse the internal and external environment in order to identify current and future opportunities, challenges, and risks.</p>		
	<b>Self-Evaluation</b>	<b>Council Supervisor Evaluation</b>
<b>Unacceptable</b>	<b>1</b>	<b>1</b>
<b>Needs Improvement</b>	<b>2</b>	<b>2</b>
<b>Meets Expectations</b>	<b>3</b>	<b>3</b>
<b>Exceeds Expectations</b>	<b>4</b>	<b>4</b>
<b>Superior</b>	<b>5</b>	<b>5</b>
<b>CAO</b> Employee Comments:		
<b>Council Supervisor</b> Comments:		

<b>Decision Making</b>		
<p>Makes concrete, well-informed, and thought-out decisions that support the overall organization. Can make quick, effective decisions, even when data and details are limited. When making unfavourable decisions that might have negative consequences, will examine the impacts and potential implications to ensure that the decision is valid for the situation.</p>		
	<b>Self-Evaluation</b>	<b>Council Supervisor Evaluation</b>
<b>Unacceptable</b>	<b>1</b>	<b>1</b>
<b>Needs Improvement</b>	<b>2</b>	<b>2</b>
<b>Meets Expectations</b>	<b>3</b>	<b>3</b>
<b>Exceeds Expectations</b>	<b>4</b>	<b>4</b>
<b>Superior</b>	<b>5</b>	<b>5</b>
<b>CAO</b> Employee Comments:		
<b>Council Supervisor</b> Comments:		

<b>Leadership</b>		
Maintains a professional and positive manner even under changing or uncertain conditions. Works well with a wide range of individuals to provide support, coaching, encouragement, and direction. Engages others in order to accomplish organizational and departmental goals and strategies.		
	<b>Self-Evaluation</b>	<b>Council Supervisor Evaluation</b>
<b>Unacceptable</b>	<b>1</b>	<b>1</b>
<b>Needs Improvement</b>	<b>2</b>	<b>2</b>
<b>Meets Expectations</b>	<b>3</b>	<b>3</b>
<b>Exceeds Expectations</b>	<b>4</b>	<b>4</b>
<b>Superior</b>	<b>5</b>	<b>5</b>
<b>CAO</b> Employee Comments:		
<b>Council Supervisor</b> Comments:		

<b>Negotiation</b>		
Gains support for ideas, proposals, and solutions from others. Helps others to understand complex initiatives and sensitive situations to resolve disagreements and conflicts. Considers others' opinions while holding strong to firm directions and goals.		
	<b>Self-Evaluation</b>	<b>Supervisor Evaluation</b>
<b>Unacceptable</b>	<b>1</b>	<b>1</b>
<b>Needs Improvement</b>	<b>2</b>	<b>2</b>
<b>Meets Expectations</b>	<b>3</b>	<b>3</b>
<b>Exceeds Expectations</b>	<b>4</b>	<b>4</b>
<b>Superior</b>	<b>5</b>	<b>5</b>
<b>CAO</b> Employee Comments:		
Supervisor Comments:		

<b>Networking and Relationship Building</b>		
Effectively builds constructive, friendly, professional relationships and networks of key contacts with people and colleagues. Maintains partnerships that can provide information, assistance, and support.		
	<b>Self-Evaluation</b>	<b>Council Supervisor Evaluation</b>
<b>Unacceptable</b>	<b>1</b>	<b>1</b>
<b>Needs Improvement</b>	<b>2</b>	<b>2</b>
<b>Meets Expectations</b>	<b>3</b>	<b>3</b>
<b>Exceeds Expectations</b>	<b>4</b>	<b>4</b>
<b>Superior</b>	<b>5</b>	<b>5</b>
<b>CAO</b> Employee Comments:		
<b>Council Supervisor</b> Comments:		

<b>Organizational and Environmental Awareness</b>		
Shows commitment to the organizational vision and strategic goals by acting in accordance with organizational expectations and through having a solid understanding of the internal environment. Uses knowledge of organizational practices and procedures to solve issues and accomplish goals. Complies with and enforces organizational policies, procedures, and practices.		
	<b>Self-Evaluation</b>	<b>Council Supervisor Evaluation</b>
<b>Unacceptable</b>	<b>1</b>	<b>1</b>
<b>Needs Improvement</b>	<b>2</b>	<b>2</b>
<b>Meets Expectations</b>	<b>3</b>	<b>3</b>
<b>Exceeds Expectations</b>	<b>4</b>	<b>4</b>
<b>Superior</b>	<b>5</b>	<b>5</b>
<b>CAO</b> Employee Comments:		
<b>Council Supervisor</b> Comments:		

<b>Planning and Organizing</b>		
Accurately estimates duration and level of difficulty of tasks and projects, setting out goals, objectives, and work plans for completion.		
	<b>Self-Evaluation</b>	<b>Council Supervisor Evaluation</b>
<b>Unacceptable</b>	<b>1</b>	<b>1</b>
<b>Needs Improvement</b>	<b>2</b>	<b>2</b>
<b>Meets Expectations</b>	<b>3</b>	<b>3</b>
<b>Exceeds Expectations</b>	<b>4</b>	<b>4</b>
<b>Superior</b>	<b>5</b>	<b>5</b>
<b>CAO</b> Employee Comments:		
<b>Council Supervisor</b> Comments:		

<b>Problem Solving</b>		
Demonstrated ability to break a situation down into smaller pieces to identify key issues. Figures out cause-and-effect relationships in order to solve them using logic and analytical methods to come to a realistic solution.		
	<b>Self-Evaluation</b>	<b>Council Supervisor Evaluation</b>
<b>Unacceptable</b>	<b>1</b>	<b>1</b>
<b>Needs Improvement</b>	<b>2</b>	<b>2</b>
<b>Meets Expectations</b>	<b>3</b>	<b>3</b>
<b>Exceeds Expectations</b>	<b>4</b>	<b>4</b>
<b>Superior</b>	<b>5</b>	<b>5</b>
<b>CAO</b> Employee Comments:		
<b>Council Supervisor</b> Comments:		

<b>Resource and Fiscal Management</b>		
Using resources such as human capital, supplies, products, materials, and other useable items effectively and with foresight to available and limited funds.		
	<b>Self-Evaluation</b>	<b>Council Supervisor-Evaluation</b>
<b>Unacceptable</b>	<b>1</b>	<b>1</b>
<b>Needs Improvement</b>	<b>2</b>	<b>2</b>
<b>Meets Expectations</b>	<b>3</b>	<b>3</b>
<b>Exceeds Expectations</b>	<b>4</b>	<b>4</b>
<b>Superior</b>	<b>5</b>	<b>5</b>
<b>CAO</b> Employee Comments:		
<b>Council Supervisor</b> Comments:		

<b>Results Orientation</b>		
The ability to focus on desired outcomes, and the means by which they are achieved, by meeting or exceeding standards based on past performance, goals, and objectives, as well as the performance or achievements of others.		
	<b>Self-Evaluation</b>	<b>Council Supervisor-Evaluation</b>
<b>Unacceptable</b>	<b>1</b>	<b>1</b>
<b>Needs Improvement</b>	<b>2</b>	<b>2</b>
<b>Meets Expectations</b>	<b>3</b>	<b>3</b>
<b>Exceeds Expectations</b>	<b>4</b>	<b>4</b>
<b>Superior</b>	<b>5</b>	<b>5</b>
<b>CAO</b> Employee Comments:		
<b>Council Supervisor</b> Comments:		

<b>Risk Management</b>		
Identifies, analyses, plans, and responds to internal and external risks factors including security breaches and health and safety. Adheres to and ensures the organization is compliant with all health and safety laws, regulations, standards, and required practices.		
	<b>Self-Evaluation</b>	<b>Council Supervisor Evaluation</b>
<b>Unacceptable</b>	<b>1</b>	<b>1</b>
<b>Needs Improvement</b>	<b>2</b>	<b>2</b>
<b>Meets Expectations</b>	<b>3</b>	<b>3</b>
<b>Exceeds Expectations</b>	<b>4</b>	<b>4</b>
<b>Superior</b>	<b>5</b>	<b>5</b>
<b>CAO</b> Employee Comments:		
<b>Council Supervisor</b> Comments:		

<b>Service Orientation</b>		
Gives superior service to both internal and external customers and patients.		
	<b>Self-Evaluation</b>	<b>Council Supervisor Evaluation</b>
<b>Unacceptable</b>	<b>1</b>	<b>1</b>
<b>Needs Improvement</b>	<b>2</b>	<b>2</b>
<b>Meets Expectations</b>	<b>3</b>	<b>3</b>
<b>Exceeds Expectations</b>	<b>4</b>	<b>4</b>
<b>Superior</b>	<b>5</b>	<b>5</b>
<b>CAO</b> Employee Comments:		
<b>Council Supervisor</b> Comments:		

<b>Strategic Thinking</b>		
Analyses and interprets the strategic direction of the organization. Has a clear and firm understanding of the vision, mission, values, and objectives of the workplace. Uses that information to develop responsibilities, tasks, goals, and initiatives that align with long-term plans and growth. Reflects on past experience, organizational practices, and processes in order to determine the correct course of action. Is able to analyse the internal and external environment in order to identify current and future opportunities, challenges, and risks.		
	<b>Self-Evaluation</b>	<b>Council Supervisor Evaluation</b>
<b>Unacceptable</b>	<b>1</b>	<b>1</b>
<b>Needs Improvement</b>	<b>2</b>	<b>2</b>
<b>Meets Expectations</b>	<b>3</b>	<b>3</b>
<b>Exceeds Expectations</b>	<b>4</b>	<b>4</b>
<b>Superior</b>	<b>5</b>	<b>5</b>
<b>CAO</b> Employee Comments:		
<b>Council Supervisor</b> Comments:		

<b>Teamwork</b>		
Works cooperatively and effectively with others to reach a common goal. Participates actively in group activities, fostering a team environment.		
	<b>Self-Evaluation</b>	<b>Council Supervisor Evaluation</b>
<b>Unacceptable</b>	<b>1</b>	<b>1</b>
<b>Needs Improvement</b>	<b>2</b>	<b>2</b>
<b>Meets Expectations</b>	<b>3</b>	<b>3</b>
<b>Exceeds Expectations</b>	<b>4</b>	<b>4</b>
<b>Superior</b>	<b>5</b>	<b>5</b>
<b>CAO</b> Employee Comments:		
<b>Council Supervisor</b> Comments:		

**Part III: Job Criteria**

<b>Specific Job Criterion:</b> <i>List an example of job-specific criteria in this place</i>		
	<b>CAO Employee:</b> 1-5	<b>Council Supervisor:</b> 1-5
<i>Pose a question in this space to give an example of what the criterion encompasses</i>		
<ul style="list-style-type: none"> <li>List in these spaces any specific job duties or requirements that correlate with the criterion</li> </ul>		
<ul style="list-style-type: none"> <li></li> </ul>		
<ul style="list-style-type: none"> <li></li> </ul>		
<b>CAO Employee</b> Comments:		
<b>Council Supervisor</b> Comments:		

<b>Specific Job Criterion:</b>		
	<b>CAO Employee:</b> 1-5	<b>Council Supervisor:</b> 1-5
<ul style="list-style-type: none"> <li></li> </ul>		
<ul style="list-style-type: none"> <li></li> </ul>		
<ul style="list-style-type: none"> <li></li> </ul>		
<b>CAO Employee</b> Comments:		
<b>Council Supervisor</b> Comments:		

Specific Job Criterion:		
	<b>CAO Employee:</b> 1-5	<b>Council Supervisor:</b> 1-5
•		
•		
•		
<b>CAO Employee</b> Comments:		
<b>Council Supervisor</b> Comments:		

Specific Job Criterion:		
	<b>CAO Employee:</b> 1-5	<b>Council Supervisor:</b> 1-5
•		
•		
•		
<b>CAO Employee</b> Comments:		
<b>Council Supervisor</b> Comments:		

**Part IV: Goal Completion**

<b>Goals for Review Period</b>
List and discuss the goals set forth for this employee during the period under review. Identify those areas of responsibility where the employee did or did not meet performance goals or project milestones. Evaluate the progress made by the employee on pre-determined goals, projects, job duties, and special assignments by selecting the appropriate box below each goal listed.
<b>Goal #1</b>
Satisfactory Progress _____ Unsatisfactory Progress _____
<b>Goal #2</b>
Satisfactory Progress _____ Unsatisfactory Progress _____
<b>Goal #3</b>
Satisfactory Progress _____ Unsatisfactory Progress _____

<b>Goals for Next Review Period</b>
List any goals, projects, job duties, and special assignments to be continued or completed in the coming year. Set these goals with the understanding that corporate priorities are subject to change as business situations change. Update this section as necessary throughout the next review period.
<b>Goal #1</b>
<b>Goal #2</b>
<b>Goal #3</b>

**Part V: Overall Performance**

<b>Overall Assessment</b>	
Use this space to specify the <b>CAO's</b> employee's overall job performance. The overall rating should reflect and take into account both job criteria, behavioural, supervisory, and goal completion rankings.	
<b>Unacceptable</b>	<b>1</b>
<b>Needs Improvement</b>	<b>2</b>
<b>Meets Expectations</b>	<b>3</b>
<b>Exceeds Expectations</b>	<b>4</b>
<b>Superior</b>	<b>5</b>
Comments:	

<b>Developmental Objectives</b>
Complete this section once you and the <b>CAO</b> employee have discussed and agreed upon opportunities for improvement of the <b>CAO's</b> employee's performance or skills. Include any training or developmental objectives, corresponding activities, and timeframes for completion.
<b>Objective #1</b>
<b>Objective #2</b>
<b>Objective #3</b>

**Part VI: ~~CAO~~ Employee Signoff**

I have been advised of my performance rankings. The rankings and comments in this review have been discussed and explained to me by ~~Council~~ my supervisor. I understand the implications of poor performance and the consequences of failing to improve my performance. My own comments are as follows:

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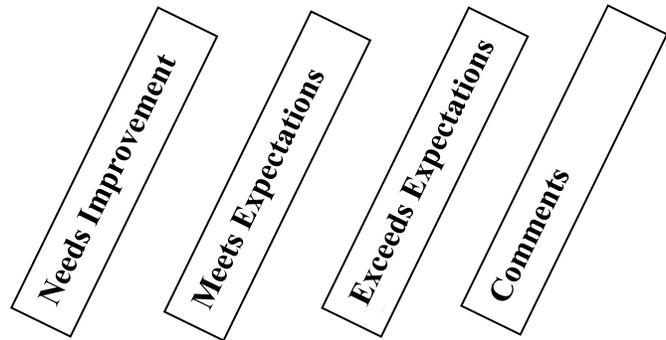
<del>CAO</del> Employee Signoff	
<del>CAO</del> Employee Signature	
Date	

<del>Council</del> Supervisor Signoff	
<del>Council</del> Supervisor Signature	
Date	



**Appendix “B” Employee Annual Performance Evaluation Form**  
**Part 1 - To Be Completed by Manager**

Employee Name \_\_\_\_\_  
 Evaluated by \_\_\_\_\_  
 Date of Evaluation \_\_\_\_\_  
 Values - Please check the box that most applies



Displays positive attitude				
Demonstrates patience				
Develops relationships with others				
Demonstrates drive, determination and Passion				
Takes personal responsibility to resolve issues				
Displays pride in their work				
Displays empathy/caring for others				
Behaves ethically				
Is trustworthy				
Is dependable				
Displays leadership through action				

Comments:

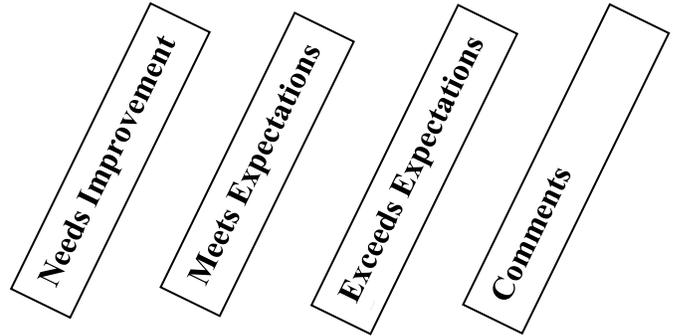
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## Appendix “B” Employee Annual Performance Evaluation Form Part 2 - To Be Completed by Employee

### Skills and Attributes



Adapts well to change / is flexible				
Manages work time efficiently				
Displays IT skillset that meets job expectations				
Implements good stress management practice				
Is a creative and innovative thinker				
Thinks critically, uses professional skepticism				
Applies research				
Possesses adequate writing skills				
Active problem solver – plans and resolves				
Attendance and Reliability				
Finances/budget skills meets job expectations				
Accomplishes work with high quality/diligence				
Considers other ways to deliver better service				
Considers the team in decisions and actions				
Communicates well internally				
Communicates appropriately to and in public				

Comments:

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## Appendix “B” Employee Annual Performance Evaluation Form

### Part 3 - To Be Completed by Employee

1. What do you like most about working for the Municipality of Barrington? What drives you to be a valued contributor to this team, this organization?
2. What was your greatest accomplishment at work this year?
3. What does your supervisor or your employer need to do differently to improve the organization or to improve your workplace?
4. Which job responsibilities / tasks do you enjoy most? Which do you least enjoy?
5. What work related issue(s) keep you up at night?
6. Do you have everything you need to perform your job?
7. I am interested in training or education in \_\_\_\_\_. I feel this would be beneficial because \_\_\_\_\_.

# Appendix “B” Employee Annual Performance Evaluation Form

## Part 4 - **To Be Completed by Manager or CAO**

### Summary and Future planning and development

Summarize the employee’s performance for the year, citing strengths and challenges, including specific examples of notable achievements and areas of potential growth.

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To be completed by the Manager and/or CAO and the employee: Identify projects, initiatives, learning opportunities that the employee is committed to achieve and the Manager/CAO committed to support. These achievements must be measurable, not necessarily inside your job description, but designed to enhance your career and the municipality as an organization or as a community.

Initiative/Project	Strategic goal outcome	Success measures	Support	Deadline

We commit to these initiatives and commit to meeting at least twice a year for an update on these initiatives.

\_\_\_\_\_  
 Manager/CAO

\_\_\_\_\_  
 Employee

# Appendix "B" - Employee Annual Performance Review Form

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## Annual Performance Review Contents

The employee annual performance review is broken into various parts for ease of use and administration.

Part I: Outlines the basic instructions to follow when completing the form. Part I also details the rating scale to use when assigning ratings for such things as job-specific behavioural competencies, as well as job criteria and corresponding duties and responsibilities.

Part II: Pertains to job-specific competencies. Competencies need to be determined by the immediate supervisor, and approved by the Chief Administrative Officer. Each position should focus on 6-10 core competencies.

Part III: Includes job-specific criteria to assess in the review. The most effective way to assign job criteria is to look at the employee's job description and group main duties and responsibilities into more general job criteria.

Once criteria have been established, a question may be formed that encompasses what the criteria refer to. Once the criteria and question have been formed, the criteria can be broken down into more specific duties and responsibilities that are pertinent to the successful performance of the criteria.

Supervisors should ensure that the duties and responsibilities assigned to the criteria are accurate and relevant to the job, as these will be the areas that will have ratings assigned to them.

Part IV: Provides an area for employees and supervisors to set and evaluate a variety of goals to be accomplished throughout the review period. It is important to identify those areas of responsibility where the employee did or did not meet performance goals or project milestones. In this section, you will also evaluate the progress made by the employee on predetermined goals, projects, job duties, and special assignments.

Part V: Is the overall performance evaluation score. In this section, both the self-evaluation scores and the supervisor evaluation scores throughout the review are calculated. Taking both total scores, the supervisor must determine an overall rating for the employee's annual performance review score. This is done by averaging out the ratings throughout the review.

Part VI: Is the employee signoff. It is imperative that the evaluating supervisor and employee meet to discuss the content and results of the annual performance review. Discussion of the review will provide an opportunity for the employer and supervisor to discuss areas of achievement as well as areas requiring improvement. This discussion may also be used to facilitate the formation of goals and objectives for the upcoming performance period. Once the employee and supervisor have met to discuss the review, each should sign the review, indicating an understanding of its contents and implications, with a copy being given to the employee and another to be kept in their file.

Employee: \_\_\_\_\_

Position: \_\_\_\_\_

Supervisor: \_\_\_\_\_

Period of evaluation (for supervisor to fill in): \_\_\_\_\_ From: \_\_\_\_\_

To: \_\_\_\_\_

## Part I: Instructions

The employee annual performance review lists the behavioural competencies and job-specific criteria against which you must rank yourself, and be ranked by your immediate supervisor. The Municipality of the District of Barrington considers these performance factors to be critical to the success of personal, departmental, and municipal goals. The criteria listed in this evaluation should accurately reflect the employee's overall performance.

In each section, rate yourself according to the table below. Be sure to add comments, thoughts, and observations, as these are important to the evaluation process. Once all data have been collected, please submit to your immediate supervisor for review and for their evaluation. Please only fill out the section requiring employee evaluation. Once completed by your supervisor, a meeting will be scheduled to review the evaluation and determine objectives and goals for the upcoming performance period. Objectives and goals from the previous performance period will also be assessed at this time and will be factored into the annual performance review meeting.

At the conclusion of the annual performance review meeting, both supervisor and employee will be required to sign and date the annual performance review, with a copy to be given to the employee and one to be kept on the employee's file.

	<b>Rating Scale</b>
<b>1</b>	<b>Unacceptable:</b> Consistently fails to meet job duties and expectations, immediate and extensive improvement needed to meet job requirements.
<b>2</b>	<b>Needs Improvement:</b> Occasionally fails to meet job duties and expectations; considerable improvement needed to meet job requirements.
<b>3</b>	<b>Meets Expectations:</b> Performs job duties at a satisfactory level according to job description, under normal supervision and direction.
<b>4</b>	<b>Exceeds Expectations:</b> Often exceeds job requirements; consistently meets goals and objectives; accomplishments occasionally made in areas outside normal job role.
<b>5</b>	<b>Superior:</b> Consistently exceeds job requirements; top performer in all areas; frequently makes accomplishments in areas outside normal job role.

## Part II: Behavioural Competencies

<b>Accountability</b>		
Takes personal ownership and responsibility for the quality and timeliness of work commitments.– Follows organizational guidelines, professional standards, regulations, and principles.– Demonstrates reliability and integrity on a daily basis.–		
	<b>Self-Evaluation</b>	<b>Supervisor Evaluation</b>
<b>Unacceptable</b>	<b>1</b>	<b>1</b>
<b>Needs Improvement</b>	<b>2</b>	<b>2</b>
<b>Meets Expectations</b>	<b>3</b>	<b>3</b>
<b>Exceeds Expectations</b>	<b>4</b>	<b>4</b>
<b>Superior</b>	<b>5</b>	<b>5</b>
Employee Comments:		
Supervisor Comments:		

<b>Adaptability</b>		
Adapts and responds to changing conditions, priorities, technologies, and requirements.– Recognizes new information and ideas with a willingness to alter opinions and behaviours.– Applies versatility, reasoning, and innovativeness in the face of change.– Able to comfortably collaborate in a variety of situations and with diverse individuals.–		
	<b>Self-Evaluation</b>	<b>Supervisor Evaluation</b>
<b>Unacceptable</b>	<b>1</b>	<b>1</b>
<b>Needs Improvement</b>	<b>2</b>	<b>2</b>
<b>Meets Expectations</b>	<b>3</b>	<b>3</b>
<b>Exceeds Expectations</b>	<b>4</b>	<b>4</b>
<b>Superior</b>	<b>5</b>	<b>5</b>
Employee Comments:		
Supervisor Comments:		

<b>Communication</b>		
Expresses and transmits information with consistency and clarity. Uses active listening techniques in order to effectively understand and provided feedback. Summarizes information according to the audience in order to promote engagement and increase understanding.		
	<b>Self-Evaluation</b>	<b>Supervisor Evaluation</b>
<b>Unacceptable</b>	<b>1</b>	<b>1</b>
<b>Needs Improvement</b>	<b>2</b>	<b>2</b>
<b>Meets Expectations</b>	<b>3</b>	<b>3</b>
<b>Exceeds Expectations</b>	<b>4</b>	<b>4</b>
<b>Superior</b>	<b>5</b>	<b>5</b>
Employee Comments:		
Supervisor Comments:		

<b>Planning and Organizing</b>		
Accurately estimates duration and level of difficulty of tasks and projects, setting out goals, objectives, and work plans for completion.		
	<b>Self-Evaluation</b>	<b>Supervisor Evaluation</b>
<b>Unacceptable</b>	<b>1</b>	<b>1</b>
<b>Needs Improvement</b>	<b>2</b>	<b>2</b>
<b>Meets Expectations</b>	<b>3</b>	<b>3</b>
<b>Exceeds Expectations</b>	<b>4</b>	<b>4</b>
<b>Superior</b>	<b>5</b>	<b>5</b>
Employee Comments:		
Supervisor Comments:		

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<b>Problem Solving</b>		
Demonstrated ability to break a situation down into smaller pieces to identify key issues. Figures out cause and effect relationships in order to solve them using logic and analytical methods to come to a realistic solution.		
	<b>Self-Evaluation</b>	<b>Supervisor Evaluation</b>
<b>Unacceptable</b>	<b>1</b>	<b>1</b>
<b>Needs Improvement</b>	<b>2</b>	<b>2</b>
<b>Meets Expectations</b>	<b>3</b>	<b>3</b>
<b>Exceeds Expectations</b>	<b>4</b>	<b>4</b>
<b>Superior</b>	<b>5</b>	<b>5</b>
Employee Comments:		
Supervisor Comments:		

<b>Service Orientation</b>		
Gives superior service to both internal and external customers and patients.		
	<b>Self-Evaluation</b>	<b>Supervisor Evaluation</b>
<b>Unacceptable</b>	<b>1</b>	<b>1</b>
<b>Needs Improvement</b>	<b>2</b>	<b>2</b>
<b>Meets Expectations</b>	<b>3</b>	<b>3</b>
<b>Exceeds Expectations</b>	<b>4</b>	<b>4</b>
<b>Superior</b>	<b>5</b>	<b>5</b>
Employee Comments:		
Supervisor Comments:		

<b>Teamwork</b>		
Works cooperatively and effectively with others to reach a common goal. Participates actively in group activities, fostering a team environment.		
	<b>Self-Evaluation</b>	<b>Supervisor Evaluation</b>
<b>Unacceptable</b>	<b>1</b>	<b>1</b>
<b>Needs Improvement</b>	<b>2</b>	<b>2</b>
<b>Meets Expectations</b>	<b>3</b>	<b>3</b>
<b>Exceeds Expectations</b>	<b>4</b>	<b>4</b>
<b>Superior</b>	<b>5</b>	<b>5</b>
Employee Comments:		
Supervisor Comments:		

**Part III: Job Criteria**

<b>Specific Job Criterion:</b> <i>List an example of job-specific criteria in this place</i>		
	<b>Employee: 1-5</b>	<b>Supervisor: 1-5</b>
<i>Pose a question in this space to give an example of what the criterion encompasses</i>		
• <i>List in these spaces any specific job duties or requirements that correlate with the criterion</i>		
•		
•		
Employee Comments:		
Supervisor Comments:		

<b>Specific Job Criterion:</b>		
	<b>Employee: 1-5</b>	<b>Supervisor: 1-5</b>
•		
•		
•		
Employee Comments:		
Supervisor Comments:		

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<b>Specific Job Criterion:</b>		
	<b>Employee: 1-5</b>	<b>Supervisor: 1-5</b>
• —		
• —		
• —		
Employee Comments:		
Supervisor Comments:		

<b>Specific Job Criterion:</b>		
	<b>Employee: 1-5</b>	<b>Supervisor: 1-5</b>
• —		
• —		
• —		
Employee Comments:		
Supervisor Comments:		

**Part IV: Goal Completion**

<b>Goals for Review Period</b>
List and discuss the goals set forth for this employee during the period under review. Identify those areas of responsibility where the employee did or did not meet performance goals or project milestones. Evaluate the progress made by the employee on pre-determined goals, projects, job duties, and special assignments by selecting the appropriate box below each goal listed.
<b>Goal #1</b>
<b>Satisfactory Progress</b> _____ <b>Unsatisfactory Progress</b> _____
<b>Goal #2</b>
<b>Satisfactory Progress</b> _____ <b>Unsatisfactory Progress</b> _____
<b>Goal #3</b>
<b>Satisfactory Progress</b> _____ <b>Unsatisfactory Progress</b> _____

<b>Goals for Next Review Period</b>
List any goals, projects, job duties, and special assignments to be continued or completed in the coming year. Set these goals with the understanding that corporate priorities are subject to change as business situations change. Update this section as necessary throughout the next review period.
<b>Goal #1</b>
<b>Goal #2</b>
<b>Goal #3</b>

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**Part V: Overall Performance**

<b>Overall Assessment</b>	
Use this space to specify the employee's overall job performance. The overall rating should reflect and take into account both job criteria, behavioural, supervisory, and goal completion rankings.	
<b>Unacceptable</b>	<b>1</b>
<b>Needs Improvement</b>	<b>2</b>
<b>Meets Expectations</b>	<b>3</b>
<b>Exceeds Expectations</b>	<b>4</b>
<b>Superior</b>	<b>5</b>
Comments:	

<b>Developmental Objectives</b>
Complete this section once you and the employee have discussed and agreed upon opportunities for improvement of the employee's performance or skills. Include any training or developmental objectives, corresponding activities, and timeframes for completion.
<b>Objective #1</b>
<b>Objective #2</b>
<b>Objective #3</b>

**Part VI: Employee Signoff**

I have been advised of my performance rankings. The rankings and comments in this review have been discussed and explained to me by my supervisor. I understand the implications of poor performance and the consequences of failing to improve my performance. My own comments are as follows:

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<b>Employee Signoff</b>	
<i>Employee Signature</i>	
<i>Date</i>	

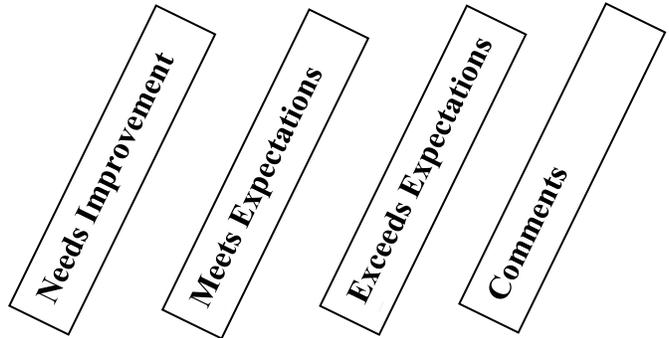
<b>Supervisor Signoff</b>	
<i>Supervisor Signature</i>	
<i>Date</i>	

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**Appendix "C" Probationary Review Form**  
**To Be Completed by Manager**

Employee Name \_\_\_\_\_  
 Evaluated by \_\_\_\_\_  
 Date of Evaluation \_\_\_\_\_  
 Please check the box that most applies



Displays positive attitude				
Demonstrates patience				
Develops relationships with others				
Displays pride in their work				
Is trustworthy				
Is dependable				
Approach to work				
Job Knowledge				
Time Management				

Comments: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

<b>MUNICIPALITY OF THE DISTRICT OF BARRINGTON POLICY AND ADMINISTRATION MANUAL</b>	<b>REFERENCE NUMBER</b> 11
<b>SECTION</b> <b>ADMINISTRATION</b>	<b>SUBJECT</b> <b>PERFORMANCE EVALUATION</b>

<b>Chief Administrative Officer's Annotation for Official Policy Book</b>	
Date of Notice to Council members of Intent to Consider	April 23, 2018
Date of Passage of current Policy	May 28, 2018
I certify that this "Administration – Performance Evaluation" was adopted by Council as indicated above.	
_____	_____
Chief Administrative Officer	Date

## VERSION LOG

Version Number	Amendment Description	Amendment/Policy Owner	Approved By	Approval Date
1	Approved Policy of Council	CAO	Council	May 28, 2018

