



POLICY NAME:

Performance Evaluation

POLICY AREA: Human Resources

POLICY NO:

APPROVAL DATE: July 28, 2025

LAST UPDATED:

POLICY STATEMENT

1. The Town of Tisdale is committed to maintaining a high standard of performance and accountability through regular and constructive performance evaluations. These evaluations provide a structured opportunity for dialogue between employees and supervisors, reinforcing mutual expectations and continuous improvement.
2. The Town of Tisdale believes its employees are its most valuable resource, essential for the effective and efficient operations of the Town and for the provision of services to its residents.
3. The Town further believes that there is a need to ensure that staff are well trained, knowledgeable about their work and effective in the performance of their duties and that all employees are entitled to give and receive regular feedback concerning their performance, related training needs, career goals and organizational goals.

PURPOSE

4. The purpose of this policy is to establish a consistent and fair framework for the performance evaluation of employees. Performance evaluations aim to:
 - Recognize accomplishments and contributions.
 - Identify areas for professional development.
 - Support career growth and succession planning.
 - Align individual performance with organizational goals and values.
 - Encourage ongoing communication between employees and supervisors.

SCOPE

5. All full-time employees shall undergo a formal review of their performance at least once in the calendar year.

FREQUENCY OF EVALUATION

6. **New Employees:** Probationary employees will be evaluated at the mid-point and end of their probationary period.



7. **Ongoing Employees:** Performance evaluations will be conducted annually, typically at the end of each calendar or fiscal year.
8. **Additional Evaluations:** May be conducted at the supervisor's discretion based on significant changes in duties, performance concerns, or developmental planning.

EVALUATION PROCESS

9. **Preparation**
 - a. Employees and supervisors will be notified in advance.
 - b. The employee may be asked to complete a self-assessment.
 - c. Supervisors will review job descriptions, past goals, and any previous evaluations.
10. **Goal Setting**
 - a. Goals for the upcoming period will be discussed and documented.
 - b. Support and resources needed to achieve these goals will be identified.
11. **Documentation**
 - a. A written evaluation form will be completed and signed by both the employee and supervisor.
 - b. The evaluation will be placed in the employee's personnel file. A copy of the duly signed performance evaluation report shall be provided to the employee at the conclusion of the evaluation.

EMPLOYEE FEEDBACK AND ACKNOWLEDGMENT

12. Employees are encouraged to provide feedback during the evaluation discussion. Signing the evaluation form indicates that the meeting occurred, but does not necessarily indicate agreement with all content.
13. The employee shall sign the form to confirm that the report was discussed with the employee and that the employee has read it and is aware of and understands the contents. The report shall be dated.
14. If an employee refuses to read the performance evaluation report, the evaluator shall read the report to the employee and note that this was done. If an employee refuses to sign the report, the evaluator shall so note on the report.

OTHER

15. Members of the Labor Committee shall evaluate the performance of the Chief Administrative Officer (CAO) in accordance with the CAO Performance Review Template (Appendix A).
16. The CAO shall conduct the performance review of the Director/Department Head in accordance with the Performance Review Template (Appendix B).
17. The Head of the Department shall conduct the performance evaluation of



employees in the Department in accordance with the Performance Review Template (Appendix C).

CONFIDENTIALITY

18. All performance evaluations are confidential. Access is restricted to the employee, the immediate supervisor, and authorized personnel in Human Resources or senior management.

Mayor

Chief Administrative Officer

CAO Performance Evaluation

An annual performance evaluation should be an essential part of the relationship between Council and the CAO, and ultimately the success of the municipality. The primary purpose is to have an informal discussion about the past year.

Evaluation Principles:

- The approach to the CAO evaluation should be in a positive manner with the broad objective of improving the organization and positively impacting the CAO, Council, Staff and the community as a whole.
- All written and oral comments regarding the performance evaluation of the CAO are strictly confidential.
- The evaluation should be conducted in an honest and fair manner. One should not allow personal feelings of likes or dislikes to influence the evaluation. Do not let one single incident make such a vivid impact that you lose sight of the total picture. All comments should be objectively based upon facts and events during the past reporting period.
- All components of the evaluation, such as comments and conclusions, must be able to be substantiated if required.
- The evaluation process should be conducted in a manner that provides for and promotes open and honest dialogue.
- The CAO should feel that he/she has been adequately included in the process.

Before completing the evaluation, take a few minutes to ask yourself the following questions and make some brief notes, including specific examples:

- ✓ How are things going?
- ✓ What has the CAO done well?
- ✓ What could have been done better?
- ✓ Are we on track?
- ✓ What could Council do to help?
- ✓ What could the CAO do to make the organization better?

Name of Chief Administrative Officer	
Evaluation Period	
Name of Elected Official(s)	

The Chief Administrative Officer provides their best advice to Council, and leads the municipal organization to carry out the direction of Council; models consistent values of high ethical awareness, honesty and fairness; develops objectives and implements strategic and operational plans to achieve the vision for the municipality, as well as the financial and operating objectives; oversees operations of the municipal organization, develops management and allocates resources, and ensures controls to safeguard municipal assets; and works with the Council to develop policy and maintain oversight.

Date of Evaluation: _____

Elected Official Signature: _____

Printed Name: _____

CAO Signature: _____

Printed Name: _____

Elected Official Signature: _____

Printed Name: _____

Evaluation Focus

The main areas to be addressed during the evaluation will be:

	CAO Comments	Council Comments
Mayor and Council		
1. Council Meetings - prepare and organize agendas; provide advice on aspects of municipal governance and legislative requirements.		
2. Council Priorities – ensure policies, programs and services are implemented, monitored, evaluated and fed back to Council.		
3. Council Relationship – approachable to Council and responds well to directions.		
4. Reporting – update the Council regularly, and identify issues as well as the financial position of the municipality.		
Administration / Management		
1. Human Resources Management - manage and supervise all municipal		

employees (hiring, evaluating, promoting, disciplining and dismissing employees)		
2. Financial Management – prepare annual and capital operating budgets; monitor and review monthly financial statements; ensure that submission of financial information to the Province as required by legislation is adhered to; work with the auditors in conducting annual financial audit.		
3. Technical Resources Management - plan, acquire, allocate, and utilize technical resources to support day-to-day operations.		
Relationships to the Community and External Stakeholders		
1. Community Engagement – keep residents, business owners, community groups		

and other stakeholders informed of the municipal events, activities and bylaw/policy updates.		
2. Community Relations – establish a positive relationship with community members.		
3. External Stakeholders Relations – establish a positive relationship with neighbouring communities, advocacy groups, vendors, contractors, and provincial government offices.		
Other Areas/Skills:		
1. Communication - express themselves clearly in conversations and interactions with others and plan and deliver oral and written communications that have a positive impact on the intended audience.		
2. Analytical and Problem-Solving - tackle a problem		

by using a logical and systemic approach; anticipate the implications and consequences of situations and take appropriate action; and analyze the municipality's competitive position, including its strengths and weaknesses.		
3. Leadership - work cooperatively with others to produce innovative solutions; take the lead in setting new partnerships, policies or procedures; delegate responsibility and coach other municipal employees to develop their capabilities.		
4. Managing Change - demonstrate support for innovation and for organizational changes needed to improve the municipality's effectiveness; initiate, sponsor and implement organizational change; and help others to successfully manage organizational change.		
5. Goal-Oriented - focus on the desired result of their		

work, and set challenging goals for other municipal employees. The Administrator must seize positive opportunities that will benefit the municipality.

Questions

Question	CAO Comments	Council Comments
<u>Annual Goals:</u> Has the CAO accomplished the Specific Annual Council and CAO Goals?		
<u>Strengths:</u> Based on your overall evaluation of the CAO, what areas would you list as his/her strong points?		
<u>Improvements:</u> Based upon your evaluation, what areas would you suggest the CAO work on to improve his/her skills to be more effective in specific areas or situations?		

Specific Annual Council and CAO Goals for the Coming Year

What are the new strategic goals and key results (which link to the CAO’s goals, the municipality’s Strategic Plan, and Council’s priorities) for the coming year?

Goal	Outcomes/Measures	Target Completion Date

Performance Evaluation (Director/Department Head)

Name of Employee	
Evaluation Period	
Name of Chief Administrative Officer	

An annual performance evaluation should be an essential part of the relationship between the CAO and the direct report, and the CAO, and ultimately the success of the municipality. The primary purpose is to have an informal discussion about the past year.

Date of Evaluation: _____

Employee's Signature: _____

Printed Name: _____

CAO Signature: _____

Printed Name: _____

Questions

Question	Employee's Comments	CAO's Comments
1. Assess your adherence to your specific goals for the review period.	N/A	N/A
2. Overall, are you satisfied with your performance over the past twelve months? Discuss.		
3. Are you clear about what is expected of you in this position?		
4. What do you believe the strengths of your performance are?		
5. What is the one thing that you would like to focus on in order to improve your performance over the next year?		
6. Is there one particular aspect of your job that you would like to focus on over the next year?		
7. Do you have any concerns about the direction of the Department that you would like to see addressed?		
8. Do you have any concerns about the direction of the Town that you would like to see addressed?		

9. Do you have any expectations relative to career development, training, etc. that you would like to communicate?

Focus Areas (To be completed by the CAO)

Review Guidelines:

Areas that are deemed not to meet requirements should contain specific examples of where the performance was such that appropriate corrective actions can be identified and followed up on by the next performance rating period.

While this performance evaluation should generally be based on performance, rather than personality, it is recognized that personality characteristics cannot be entirely divorced from performance. Personality will dictate to a great extent how other individuals interact with the position, and to a great extent will reflect on the ultimate performance of the organization.

Area	Meet Requirements	Does Not Meet Requirements
Demonstrates required job skills and knowledge		
Uses resources available in an effective manner		
Responds effectively to assigned responsibilities		
Effectively directs and supervises the performance of all employees in accordance with Municipal policies		
Takes responsibility for actions		
Honours commitments		
Demonstrates effective problem-solving skills		
Generates creative ideas and solutions		
Meets challenges head-on		
Sound decision-making ability		
Offers quality advice to the CAO		

Compliance with policies		
Is organized and ensures the assigned work gets done		
Effectively communicates with the CAO		
Works well with staff		
Works well with contractors		
Sets good example for staff		
Budget management & control		
Willingness to be flexible and adapt to changing circumstances		

Additional Comments:

Specific Goals for the Coming Year

What are the new strategic goals and key results (which link to the CAO’s goals, the municipality’s Strategic Plan, and Council’s priorities) for the coming year?

Goal	Outcomes/Measures	Target Completion Date

Performance Evaluation (In-Scope Personnel)

Name of Employee	
Evaluation Period	
Name of Department Head	

An annual performance evaluation should be an essential part of the relationship between staff and the Department Head and ultimately, the success of the municipality. The primary purpose is to have an informal discussion about the past year.

Date of Evaluation: _____

Employee's Signature: _____

Printed Name: _____

Dept Head Signature: _____

Printed Name: _____

Questions

Question	Employee's Comments	Dept Head/Supervisor's Comments
1. Assess your adherence to your specific goals for the review period.		
2. Overall, are you satisfied with your performance over the past twelve months? Discuss.		
3. Are you clear about what is expected of you in this position?		
4. What do you believe the strengths of your performance are?		
5. What is the one thing that you would like to focus on in order to improve your performance over the next year?		
6. Is there one particular aspect of your job that you would like to focus on over the next year?		
7. Do you have any concerns about the direction of the Department that you would like to see addressed?		
8. Do you have any concerns about the direction of the Town that you would like to see addressed?		

9. Do you have any expectations relative to career development, training, etc. that you would like to communicate?

Focus Areas (To be completed by the Department Head)

Review Guidelines:

Areas that are deemed not to meet requirements should contain specific examples of where the performance was such that appropriate corrective actions can be identified and followed up on by the next performance rating period.

While this performance evaluation should generally be based on performance, rather than personality, it is recognized that personality characteristics cannot be entirely divorced from performance. Personality will dictate to a great extent how other individuals interact with the position, and to a great extent will reflect on the ultimate performance of the organization.

Area	Meet Requirements	Area(s) of Improvement
Understands job duties and responsibilities.		
Applies technical knowledge effectively.		
Seeks training when needed.		
Produces accurate and thorough work.		
Meets performance standards consistently.		
Shows attention to detail.		
Uses time effectively; meets deadlines.		
Organizes tasks and manages workload.		
Uses equipment and materials responsibly.		
Arrives on time and works scheduled hours.		
Provides appropriate notice of absences.		
Demonstrates reliability and dependability.		
Communicates effectively (verbal and written).		
Treats others with respect and courtesy.		

Works cooperatively with coworkers and public.		
Follows safety procedures and protocols.		
Uses PPE and equipment properly.		
Complies with municipal policies and procedures.		
Willingness to be flexible and adapt to changing circumstances		

Additional Comments:

Goals and Development Plan

What are your key goals and development plan for the coming year?

Goal	Outcomes/Measures	Target Completion Date