



# PROCEDURE

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**PROCEDURE NO:** 120•1

**PAGE:** 1 OF 5

**TITLE:** City Manager Performance  
Management Process

**APPROVAL DATE:** November 3, 2014

**POLICY:** 120, City Manager Performance Management

**REVISION DATE:**

**SECTION:** Administration

**RESPONSIBLE**

**DEPARTMENT:** Human Resources

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## **Performance Review Timelines:**

The City Manager 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 City Council evaluates the City Manager's performance over the prior year before the new Council is elected.

The City Manager will already have performance goals/key objectives in place to share with a newly elected City Council in the first year of their term.

The new City Council may use the mid-point evaluation as a way to fine-tune the performance goals/key objectives of the City Manager. Alternately, City Council's quarterly strategic priorities meeting could be used for this purpose.

The first time the new City Council evaluates the City Manager is one (1) year after it has been elected.

**City Manager Review Process:**

**Step 1: Objectives and Goal Setting**

The purpose of this step is for the City Manager and City 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 within the overall context of the Strategic Plan for the City.

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

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

City Council and the City Manager 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. City Council could also complete periodic review of City Manager progress on key objectives through the quarterly strategic objectives meetings.

**Step 3: Annual Performance Review (see detailed schedule below for more details)**

**City Manager**

City Manager 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 City Council member completes the City Manager Performance Review form individually and forwards it to the Mayor. The Mayor then collates all feedback into a summary document.

**Human Resources**

Human Resources prepares and administers confidential surveys of the Corporate Leadership Team (CLT) and any other members of the City's workforce identified for each annual performance review. If a 360 tool is to be used in the Performance Review, HR sources and organizes it. Results of these surveys and the 360 (if used) are provided to the Mayor.

**Pre-Performance Review Meeting**

The Mayor collates all information gathered from the City Manager, City 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 City Manager. Council also determines any salary adjustment (merit increase) based on overall performance.

**Performance Review Meeting**

The Mayor meets with the City Manager to provide formal, documented feedback as gathered above and to communicate Council's compensation adjustment decision.

**Step 4: Cycle repeats with Step 1.**

**Detailed Annual Performance Review Schedule**

<b>DELIVERABLE</b>	<b>WHO</b>	<b>DUE DATE</b>
Send reminder of City Manager review timelines to Mayor	HR	July 15
Meet with Mayor to discuss components of evaluation, ie, 360 feedback, survey of direct reports, etc	HR	July 25
Develop and send out surveys for direct reports and/or others	HR	August 1
Source and implement a 360 process/tool for City Manager(if being used)	HR	August 1
Advise City Manager to complete self-assessment	Mayor	August 1
Advise Council members to complete performance review document for City Manager	Mayor	August 1
Complete performance review document for the City Manager, each Council member individually and submit to 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	City Manager	August 15
Collate and summarize Council feedback; collate all other information gathered and send to Council for review	Mayor	August 20
Meet to discuss City Manager review and provide overall feedback; decide on salary adjustment	Mayor and Council	September 1
Summarize all feedback from Council into City Manager performance review document	Mayor	September 10
Meet with City Manager to deliver feedback and advise of salary adjustment	Mayor	September 15
Advise HR to process salary adjustment for the City Manager.	Mayor	September 15
Process salary adjustment for City Manager, retroactive to CM anniversary date	HR	September 20
Develop key performance objectives for coming year	City Manager	September 20
Share and discuss key performance objectives for coming year with Council; finalize	City Manager, Mayor and Council	September 30
Mid-Year Check-In (if used) or <i>quarterly review with Council at Strategic Priority Chart review.</i>	City Manager, Mayor and Council	March 30 (Dec, Mar, June)

**Supporting Documents**

- Annual Goal Setting
- Mid-Year Check-In
- City Manager Self-Assessment Tool
- Annual Performance Review