



Islands Trust

Policy:	2.5.1
Approved By:	Trust Council
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Amendment Date(s):	
Policy Holder:	Director, Legislative and Information Services (Secretary)

Chief Administrative Officer Performance Evaluation

Overview

The Chief Administrative Officer (CAO) plays a pivotal role in the leadership and management of Islands Trust, serving as the primary link between Trust Council, staff, and external partner groups. The CAO is responsible for providing strategic advice, ensuring organizational effectiveness, and driving the implementation of Trust Council's priorities and goals. This leadership position directly influences the success of the organization, the morale of staff, and the relationships with key partners, including local communities, First Nations, and other levels of government.

Given the importance of this role, a robust and comprehensive performance review process is essential to:

- ensure accountability and alignment with the organization's strategic direction
- provide a fair and constructive mechanism for feedback
- foster continuous professional development and improvement
- support the CAO in navigating challenges and achieving organizational excellence

This policy outlines a transparent and consistent framework for evaluating the CAO's performance, ensuring their efforts are recognized, their challenges are addressed, and their leadership drives the success of Islands Trust.

Purpose

This policy establishes a structured, fair, and transparent process for evaluating the performance of the CAO of Islands Trust. It aims to:

- promote accountability, leadership, and continuous improvement
- align the CAO's performance with the strategic goals of Islands Trust
- facilitate open and constructive feedback between the CAO, Trust Council, and staff
- ensure organizational and operational effectiveness

Scope

This Performance Evaluation Policy applies only to the CAO of Islands Trust Council.

Policy

1. CAO Performance Evaluation Framework

1.1 Initial Six-Month Review and Evaluation

1.1.1 Purpose: The initial six-month review evaluates the CAO's integration into Islands Trust, their capacity to address immediate priorities, and their demonstrated leadership potential.

1.1.2 Areas for Review:

- Building relationships with trustees, direct reports, staff, and external partner groups.
- Understanding organizational policies, challenges, culture, and strategic priorities.
- Delivering on key initial responsibilities, such as supporting and providing high-quality advice to Trust Council, establishing performance plans for senior staff, improving organizational communication, and assessing the strategic and operational needs of Islands Trust.
- Ethical standards, decision-making, and accountability.

1.1.3 360 Process:

- Self-Assessment: The CAO completes a self-assessment report reflecting on achievements and challenges.
- Feedback Collection: Feedback is gathered via surveys and interviews from trustees, staff, and, if required, external partner groups. An external consultant will conduct this process and produce a report, to be presented to the designated CAO Performance Evaluation Committee (CAOPEC).
- Evaluation Committee: The CAOPEC reviews the findings of the report.
- Evaluation Meeting: The CAOPEC meets with the CAO to review findings and discuss short and long-term goals for the CAO, to be evaluated at the annual performance review.

1.2 Recurring Annual Performance Review

1.2.1 Purpose: The review evaluates the CAO's annual key performance objectives, based on progress on strategic goals, personal development goals, and contribution to organizational performance.

1.2.2 Areas for Review:

- Leadership and Management: Staff morale, retention, empowerment, and overall organizational culture.
- Strategic Planning and Implementation: Progress on Trust Council's strategic and corporate plans.

- **Communication and Relationship-Building:** Effective communication with staff, trustees, and external partner groups, including First Nations and government agencies.
- **Operational Efficiency:** Streamlining operations, improving processes, and ensuring financial accountability through effective budget management.
- **Ethics and Accountability:** Maintenance of ethical standards, transparency, and accountability.

1.2.3 360 Process:

- **Self-Assessment:** The CAO reflects on their performance and progress toward goals.
- **Feedback Collection:** A 360-degree feedback process, including surveys and interviews with trustees, staff, and, if required, external partner groups. An external consultant will conduct this process and produce a report, to be presented to the CAOPEC.
- **Evaluation Committee:** The CAOPEC reviews the findings of the report.
- **Evaluation Meeting:** The committee meets with the CAO to discuss the review and establish new goals.
- **Report and Documentation:** A written report summarizes the evaluation, key findings, and agreed-upon objectives for the following year. It is agreed upon and signed by the Chair, Vice-Chair, and CAO, and endorsed by Trust Council.

1.2.4 Schedule for Annual Performance Review:

- Annually, in April, the CAOPEC will establish a start date to initiate and schedule an evaluation process, and update appendix 1 to reflect the needs of that particular year.
- See Appendix I for a detailed timetable for the annual CAO performance review process.

1.2.5 The final evaluation of the Chief Administrative Officer will be endorsed by Trust Council and then signed by the Chair, the Vice-chair, and the Chief Administrative Office.

2. Evaluation Criteria

- **Strategic Leadership:** Demonstrates strategic thinking, provides actionable advice, and implements Trust Council's vision and priorities.
- **Staff and Organizational Support:** Builds a safe, inclusive workplace culture, empowers staff, and maintains high staff morale.

- **Partner Engagement:** Effectively communicates and builds partnerships with key external groups, including Islands Trust communities, First Nations, and regional and provincial government entities.
- **Operational Excellence:** Demonstrates adaptability, innovation, and the ability to solve emerging challenges.
- **Ethics and Integrity:** Exhibits transparency, fairness, and accountability in all actions and decisions.

3. Methods of Evaluation

- **360-Degree Feedback:** Surveys and interviews with trustees, senior staff, and key partner groups.
- **Independent Third-Party Reviews:** Employing an external consultant to manage the evaluations process objectively on an annual basis and offer feedback on the process where necessary.
- **Performance Metrics:** Progress reports on strategic goals, operational improvements, and organizational milestones.
- **Trustee and Staff Surveys:** Anonymous surveys to evaluate the CAO's support and leadership.
- **Self-Assessment Reports:** Annual self-evaluations reflecting on progress and identifying challenges.
- **Benchmarking:** Comparing the CAO's role and performance with similar positions in other BC local governments to ensure fair assessments.

4. Compensation

- **Performance-Based Adjustments:** Adjustments to the CAO's salary or other compensation will be based on the overall performance as outlined in this policy unless specific terms are separately prescribed in the CAO's employment contract.

4.1 Compensation Review:

- The CAOPEC will review the CAO's compensation annually.
- The CAOPEC will consider performance evaluation results, progress on strategic goals, and any relevant market benchmarks.
- The committee will make a recommendation regarding compensation adjustments to Trust Council for approval.

5. CAO Feedback

To ensure fairness and organizational improvement, the CAO will be given opportunities to:

- Provide feedback on systemic challenges, organizational dysfunctions, or other barriers.
- Offer insights and strategic advice for improving operations and decision-making.

6. Confidentiality and Reporting

- All feedback collected during the evaluation process will remain confidential and anonymized to ensure open and honest responses.
- Final evaluation reports will be shared with Trust Council and maintained by Human Resources as part of the CAO's employment records.

7. Review and Amendments

- This policy will be reviewed on an annual basis by Trust Council to ensure its effectiveness and relevance. An external consultant may be hired to assist with the Performance Evaluation review.
- Amendments may be made to incorporate best practices or address organizational needs.

8. Approval and Implementation

The CAO Performance Evaluation Policy integrates robust evaluation, accountability, and performance-based considerations to ensure the CAO's role is effectively aligned with the organizational priorities of Islands Trust.

Appendix I

Schedule for Annual Performance Review

****This schedule template is adjustable and can be amended on an annual basis by the Chief Administrative Officer Performance Evaluation Committee.**

DELIVERABLE	WHO	DUE DATE
Start date of the evaluation process		
Engage consultant (contract) to undertake and report on the 360 reviews		
360 review start		
360 reviews completed		
Report on 360 reviews to the CAOPEC		
Performance metrics		
Benchmarks		
Self-review completed		
Review of input, benchmarks		
Discussion with CAO		