

# EPL CEO Performance Appraisal Evaluation

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Please identify your relationship to the CEO:  Board Member     Direct Report to CEO     CEO

I understand and agree to above privacy statement

## CEO Evaluation Rating Scale

LEVEL	DESCRIPTION	ADDITIONAL INFORMATION
5	Outstanding	Performance consistently and significantly exceed expectations in this area.
4	Excellent	Performance frequently exceeds and surpasses requirements or standards for effectiveness in this area.
3	Successful	The CEO consistently meets the requirements or the standards in this area. Results are what are expected of a fully qualified and experienced individual in this area.
2	Needs Improvement/Developing	Meets some but not all requirements or standards for effectiveness in this area.
1	Unsatisfactory	The CEO does not meet the minimum requirements or standards for effectiveness in this area. Further development in this area is needed.
NA	No Answer	Unable to rate due to insufficient time to observe or limited knowledge of area being assessed.

Vision, Strategic Leadership and Planning	Rating					
	5	4	3	2	1	NA
1. Engages with and supports the board in strategic planning activities, including development and establishment of the Library's Vision and Strategic Plan.						
2. Works with the Board Chair and other trustees to enable the Board to fulfill its governance functions, including support in defining roles and responsibilities, evaluating board performance, recruiting board members, policy development and revision and other activities.						
3. Creates and provides strategic leadership and vision for the staff in establishing and delivering excellent public library services.						
4. Leads the development, implementation, effective delegation, monitoring, evaluation and reporting of EPL's Business Plan that reflects Board's Strategic Plan.						
5. Leads development and revision of administrative policies.						
6. Identifies key risks to EPL, reviews risks with the Board and implements appropriate systems to mitigate and manage risks.						
7. Ensures all EPL activities are conducted in accordance with policies, laws, regulations and EPL Employee Code of Conduct.						

8. Overall Rating	5	4	3	2	1	NA
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Finance and Budget Development	Rating					
	5	4	3	2	1	NA
1. Oversees the fiscal activities of the Library and assures appropriate controls.						
2. Develops draft operating and capital budgets for Board approval; prepares and presents annual Library budget proposal(s) and other reports as required for City Council.						
3. Effectively delivers excellent library services within approved budgets.						
4. Provides regular and proactive reporting and forecasting of financial results to the Finance & Audit Committee and/or Board.						
5. Oversees development and implementation of robust fund development program and reports regularly to Board on fundraising progress.						
6. Overall Rating	5	4	3	2	1	NA

Advocacy, Stakeholder Relations and Communication	Rating					
	5	4	3	2	1	NA
1. Advocates and appropriately positions EPL with key external stakeholders.						
2. Develops, nurtures and maintains strong relationships with external stakeholders (City of Edmonton Administration, Provincial Government & other agencies).						
3. Proactively and regularly reaches out and communicates with all levels of staff.						
4. Ensures EPL has a strong community image and brand awareness, including a comprehensive marketing and communications strategy that is reflective of EPL's community-led framework.						
5. Consistently communicates in a focused, organized, concise and effective manner.						
6. Listens actively to ensure understanding of others' ideas to improve organizational effectiveness and services.						
7. Effectively serves as the chief spokesperson for EPL.						
8. Provides information, expertise and advice to support decision-making by the Board of Trustees and ensures that the Board is well informed.						
9. Overall Rating	5	4	3	2	1	NA

Organizational Development and Leadership	Rating					
	5	4	3	2	1	NA
1. Provides general oversight of all organizational activities, manages day-to-day operations, and assures a smoothly functioning, efficient organization.						
2. Builds effective teams; Fosters and promotes a culture of engagement, teamwork, openness, innovation, collaboration and creativity among staff and the Board.						

3. Consistently displays integrity, accountability and models EPL values.						
4. Assures process for recruiting, developing, motivating, supporting and evaluating staff and volunteers committed to excellence in library service.						
5. Allocates resources within the strategic, policy, and financial framework established by the board to ensure operational efficiency and effectiveness with an emphasis on strong customer services.						
6. Focuses on organizational performance; ensures accountability and drives results. Action-oriented and resourceful.						
7. Recruits, develops and evaluates senior leaders and establishes a succession plan for EPL.						
8. Effectively leads and manages continuity, change and transition for self and others. Demonstrates resilience, composure and a positive outlook in an environment of uncertainty and ambiguity.						
9. Effectively manages performance, provides constructive and respectful feedback to encourage and enable performance excellence.						
10. Delegates effectively; gets work done through others						
11. Overall Rating	5	4	3	2	1	NA

CEO Goals and Business Plan	Rating					
1. Overall, and keeping unanticipated challenges and timeframes in mind, the CEO has achieved the goals and Business Plan actions outlined in this performance appraisal period.	5	4	3	2	1	NA

<b>Specific Strengths and Successes:</b>
<b>Areas Requiring Further Development:</b>
<b>Additional Comments:</b>