

000479

COUNTY ATTORNEY
ANNUAL PERFORMANCE REVIEW PACKET

COUNTY ATTORNEY PERFORMANCE EVALUATION

- A. The County Attorney's Performance Review Instrument shall consist of two sections:
1. *Section I will address the Attorney's performance in advising and assisting the Board of County Commissioner and County Manager so that the objectives associated with the three goals of the Commission are met in a manner permitted by law.*
 2. *Section II will address the Attorney's overall performance in leading the County Attorney's Office, as reflected in nine factor categories. These factors are defined on the attached Factor Definitions sheet.*
- B. The Personnel Office will forward a copy of the County Attorney Performance Evaluation to each Commissioner no later than August 1st of each year.
- C. The Attorney will complete Sections I and II of the Performance Evaluation, detailing his perceptions of how he has met the Commission's expectations in those sections over the past fiscal year and will provide a numerical score. The County Attorney may submit a list of significant accomplishments for the past fiscal year. A copy of the Attorney's self review will be forwarded to each Commissioner no later than August 15th of each year.
- D. Each Commissioner will complete a review of the County Attorney, using the Attorney's self review as a resource and documentation. The individually completed reviews will be returned to the Chair by August 30th of each year. The Chair will compile the individual reviews and prepare a consensus review that the Commission will consider at a workshop to be held the first week of September.
- E. At the workshop the Commission will agree on an overall performance review score and associated merit increase, if any, and schedule the review for action at the next Board meeting.
- F. All ratings will be based on a 10 point scale within five categories: Unacceptable: 0 - 0.99; Below Expectations: 1.00 - 3.99; Meets Expectations: 4.00 - 6.99; Exceeds Expectations: 7.00 - 8.99 and Outstanding: 9.00 -10.00.
- G. At the workshop the Commission will discuss any differences between the Attorney's perceptions and their own reviews. They will also discuss any deficiencies in the Attorney's performance.
- H. In the event the Board determines that the Attorney's performance is deficient, the Attorney and the Chair, on behalf of the Commission, will complete the Performance Agreement Plan contained in Section III.

**County Attorney
Performance Review Rating Sheet**

**Section I
Commission Goals - Quality of Life**

The Board of County Commissioners has developed a number of objectives within three major goal areas, and has assigned the Manager the responsibility to develop action plans detailing how these objectives will be met. The Attorney's responsibility under the Charter is to provide legal advice and representation to the Board of County Commissioners and to the County Manager and his staff. The Board will determine if the Attorney has properly advised and assisted the Board and the Manager in meeting the Board's goals. This Section will constitute 25% of the overall performance review rating for the fiscal year.

Employee Name: David W. Wagner

Rating Period:

Date Completed:

COMMISSION GOAL	COMMENTS	RATING
Quality of Life - Ensure that actions that enhance and preserve Alachua County's quality of life by integrating environmental, economic and social equity principles into County decision making to assure responsible development and appropriate service		
Objective - Sustainable Economic Development Plan		
Objective - Land Conservation Plan		
Objective - Air Quality		
Objective - Review all Land Development Regulations		
Objective - Re-evaluate Water Quality Program		
Objective - Review Development Review Process		

**County Attorney
Performance Review Rating Sheet**

**Section I
Commission Goals- Partnerships**

Employee Name: David W. Wagner

Rating Period:

Date Completed:

COMMISSION GOAL	COMMENTS	RATING
Partnerships - Increase confidence in County government by enhancing citizen participation and forging new partnerships with public and private organizations (2 objectives for FY 99/00)		
Objective - Public Involvement Plan		
Objective - Consolidation of Fire Services		

**County Attorney
Performance Review Rating Sheet**

**Section I
Commission Goals - Excellence**

Employee Name: David W. Wagner

Rating Period:

Date Completed:

COMMISSION GOAL	COMMENTS	RATING
Excellence in County Government - Excel by focusing on performance, accountability and customer service (3 objectives for FY 99/00)		
Objective - Agenda Process		
Objective - Review Fiscal Policies		
Objective - Commission Office		

**County Attorney
Performance Review Rating Sheet**

**SECTION II
COUNTY ATTORNEY
PERFORMANCE REVIEW FACTOR DEFINITIONS**

Section II addresses the County Attorney's overall performance in leading and managing the County Attorney's Office to ensure that timely and accurate legal services are provided to the Board of County Commissioners and County Manager. The Attorney's performance is evaluated based on the following performance review factors.

1. **Quality of Legal Services:** The Attorney shall ensure that the Attorney's Office provides high quality and timely legal services.
2. **Commission/Attorney Interaction:** The Attorney will develop effective communication practices with each County Commissioner. The Attorney will keep the Commission informed of issues of concern.
3. **Reflects County Values:** The County Attorney's performance should reflect the values adopted by the organization - Integrity; Honesty; Respect; Diversity; Innovation; Accountability and Communication.
4. **Communication:** The Attorney should make himself available to meet and discuss issues with Commissioners, County staff attorneys, and citizens and maintain open lines of communication. His oral and written communications with staff attorneys and citizens should be clear and easily understood.
5. **Team Participation:** The Attorney should provide sufficient assistance, direction and support to teams to enable and encourage them to accomplish their goals. The Attorney's Office shall be accepted as part of the County team.
6. **Interpersonal Skills:** The Attorney shall maintain cooperative and effective relationships with County Commissioners, Constitutional Officers, County staff, local government attorneys, and private attorneys. The Attorney shall demonstrate the ability handle conflicts and confrontational situations in a civil manner.
7. **Professional Presentation:** The Attorney will present a professional image in dress and action at all times. Any interaction with staff or citizens will be conducted in a professional manner that will re-affirm the professionalism of the County.
8. **Office Leadership/Management:** The Attorney will exhibit strong leadership skills in dealing with citizens and other government officials and in managing the County Attorney's Office. The Attorney will maintain a happy, productive working environment in the County Attorney's Office.
9. **Professional Skills** The Attorney will demonstrate an understanding of all areas of local government law. The Attorney will document to the Board that special counsel be retained when special expertise is needed. The Attorney will analyze controversial and complex issues and anticipate legal issues.

County Attorney Performance Review Rating Sheet

Section II Performance Review Factors

Following are the Performance Review Factors assigned the County Attorney to review/rate the Attorney's performance. The performance review rating will be based upon how well the expectations of the individual Commissioners, for each factor, are met. This Section will constitute 75% of the overall performance review rating for the fiscal year.

Employee Name: David W. Wagner

Rating Period:

Date Completed:

PERFORMANCE REVIEW FACTOR	COMMENTS	RATING
Quality of Legal Services		
Performance Reflects County Values		
Ability to Communicate		
Team Participation		
Interpersonal Skills		
Professional Presentation		
Office Leadership/Management		
Professional Skills		
Commission/Attorney Interaction		

**County Attorney
Performance Review Rating Sheet**

**Section II
Performance Review Rating Sheet**

Employee Name: David W. Wagner

Rating Period:

Date Completed:

Goals:	Rating
Quality of Life	_____
Partnerships	_____
Excellence in County Government	_____
Performance Factors:	
Reflects County Values	_____
Communication	_____
Team Participation	_____
Interpersonal Skills	_____
Professional Presentation	_____
Office Leadership/Management	_____
Professional Skills	_____
Quality of Legal Services	_____
Commission/Attorney Interaction	_____
	Total _____
	Average _____
	Final Score _____

**County Attorney
Performance Review Rating Sheet**

**Section III
Performance Agreement Plan**

In the event that any of the performance categories in this performance review, fall below expectations, the Attorney and the Commission will complete this Performance Agreement Plan for upcoming Fiscal Year 2000/2001. This Plan will list the area(s) where the Attorney's performance fell below expectations, and will also include a plan for improvement in the coming fiscal year. The expectations for the coming fiscal year will be clearly stated and will be quantifiable and measurable.

Performance Factor/Goal	Performance Plan Expectation
1.	
2.	
3.	
4.	
5.	
6.	

County Attorney

Date

Commission Chair

Date

COUNTY MANAGER
ANNUAL PERFORMANCE REVIEW PACKET

COUNTY MANAGER
ANNUAL PERFORMANCE REVIEW PACKET
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- II. Section I - Commission Goals Rating Form
- III. Performance Review Factor Definitions
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COUNTY MANAGER PERFORMANCE PLAN

- A. The County Manager's Performance Review Instrument shall consist of three sections:
1. *Section I will address the Manager's ability to meet the objectives associated with the three goals of the Commission, within the time frames established.*
 2. *Section II will address the Manager's overall performance in leading the organization, as reflected in nine factor categories. These factors are briefly defined on the attached Factor Definitions sheet.*
 3. *Section III will consist of a Performance Agreement Plan, signed by the Manager and the Commission Chair, on behalf of the Commission, that outlines the those areas that are deficient and provides direction for improvement, in a mutually agreed upon plan for the upcoming fiscal year.*
- B. The Personnel Office will forward a copy of the County Manager Performance Plan to the Manager and each Commissioner no later than August 1st of each year.
- C. The Manager will complete Sections I and II of the Performance Plan, detailing his perceptions of how he has met the Commission's expectations in those sections over the past fiscal year and will provide a numerical score. A copy of the Manager's self review will be forwarded to each Commissioner no later than August 15th of each year.
- D. Each Commissioner will complete a review of the County Manager, using the Manager's self review as a resource and documentation. The individually completed reviews will be returned to the Chair by August 30th of each year. The Chair will compile the individual reviews and prepare a consensus review that the Commission will consider at a workshop to be held the first week of September.
- E. At the workshop the Commission will agree on an overall performance review score and associated merit and schedule it for action at the next Board meeting.
- F. All ratings will be based on a 10 point scale within five categories: Unacceptable: 0 - 0.99; Below Expectations: 1.00 - 3.99; Meets Expectations: 4.00 - 6.99; Exceeds Expectations: 7.00 - 8.99 and Outstanding: 9.00 -10.00.
- G. At the workshop the Commission will discuss any differences between the Manager's perceptions and their own reviews. They will also discuss any deficiencies in the Manager's performance and will complete the Performance Agreement Plan for the Manager and Chair's signature. This Plan will detail areas of improvement for the upcoming fiscal year.

SECTION I

COMMISSION GOALS

The Board of County Commissioners has developed a number of objectives within three major goal areas, and has assigned the Manager the responsibility to develop action plans detailing how these objectives will be met. The Board will determine if the Manager has met your expectations for the action plans that were developed to address the objectives contained within the goals. This Section will constitute 50% of the overall performance review rating for the fiscal year.

Employee Name: _____ Rating Period: _____ Date Completed: _____

COMMISSION GOAL	RATING	COMMENTS
Quality of Life - Enhance and preserve Alachua County's quality of life by integrating environmental, economic and social equity principles into County decision making to assure responsible development and appropriate service delivery. (6 objectives for FY 99/00)		
Sustainable Economic Development Plan		
Land Conservation Plan		
Air Quality		

Commission Goal - Quality of Life (Cont'd) (FY 99/00)	Rating	Comments
Review all Land Development Regulations		
Re-evaluate Water Quality Program		
Review Development Review Process		

COMMISSION GOAL	RATING	COMMENTS
<p>Partnerships - Increase confidence in County government by enhancing citizen participation and forging new partnerships with public and private organizations. (2 objectives for FY 99/00)</p>		
<p>Public Involvement Plan</p>		
<p>Consolidation of Fire Services</p>		

COMMISSION GOAL	RATING	COMMENTS
<p>Excellence in County Government - Excel by focusing on performance, accountability and customer service. (3 objectives for FY 99/00)</p>		
<p>Commission Office</p>		
<p>Agenda Process</p>		
<p>Review Fiscal Policies</p>		

**COUNTY MANAGER
PERFORMANCE REVIEW FACTOR DEFINITIONS**

- 1) **Reflects County Values:** The County Manager's performance should reflect the values adopted by the organization - Integrity; Honesty; Respect; Diversity; Innovation; Accountability and Communication.
- 2) **Communication:** The Manager should make himself available to meet and discuss issues with staff and citizens and maintain open lines of communication. His communications with staff and citizens should be clear and easily understood.
- 3) **Team Management:** The Manager should provide sufficient authority, direction and support to teams to enable and encourage them to accomplish their goals.
- 4) **Fiscal Management:** The Manager will ensure the financial solvency of the County government, while exploring and recommending acceptable alternate forms of revenue.
- 5) **Professional Presentation:** The Manager will present a professional image in dress and action at all times. Any interaction with staff or citizens will be conducted in a professional manner that will re-affirm the professionalism of the County.
- 6) **Organizational Leadership:** The Manager will exhibit strong leadership skills in moving County operations in the direction that the Commission has chosen. The organization will be well run with high levels of satisfaction among employees and evidence of efficient operations.
- 7) **Project Management:** The Manager will steer and oversee projects in a manner that results in achievement of goals within established time-frames and budget.
- 8) **Community Involvement:** The Manager will participate in community events and will foster effective and cooperative working relationships with community leaders.
- 9) **Commission/Manager Interaction:** The Manager will work with the Commission to develop effective communication practices with each member and in particular, the Chair. The Manager will keep the Commission informed of issues of concern.

SECTION II

Following are the Performance Review factors assigned the County Manager to review/rate organizational management performance. The performance review rating will be based upon how well the expectations of the individual Commissioners, for each factor, are met. This Section will constitute 50% of the overall performance review rating for the fiscal year.

RATING

COMMENTS

PERFORMANCE REVIEW FACTOR

Performance Reflects County Values

RATING

COMMENTS

PERFORMANCE REVIEW FACTOR

Ability to Communicate

RATING

COMMENTS

PERFORMANCE REVIEW FACTOR

Team Management

RATING

COMMENTS

PERFORMANCE REVIEW FACTOR

Fiscal Management

RATING

COMMENTS

PERFORMANCE REVIEW FACTOR

Professional Presentation

RATING

COMMENTS

PERFORMANCE REVIEW FACTOR

Organizational Leadership

RATING

COMMENTS

PERFORMANCE REVIEW FACTOR

Project Management

PERFORMANCE REVIEW FACTOR

Community Involvement _____

COMMENTS

RATING

PERFORMANCE REVIEW FACTOR

Commission/Manager Interaction _____

COMMENTS

RATING

SECTION III

**COUNTY MANAGER
PERFORMANCE AGREEMENT PLAN**

In the event that any of the performance categories in this performance review, fall below expectations, the Manager and the Commission will complete this Performance Agreement Plan for upcoming Fiscal Year 2000/01. This Plan will list the area(s) where the Manager's performance fell below expectations, and will also include a plan for improvement in the coming fiscal year. The expectations for the coming fiscal year will be clearly stated and will be quantifiable and measurable

Performance Factor/Goal

Performance Plan
Expectation

1)

2)

3)

4)

5)

County Manager

Date

Commission Chairman

Date



PERFORMANCE EVALUATION OUTLINE FOR CITY MANAGER

This outline is provided to assist the Melbourne City Council in evaluation of the City Manager.

Evaluation categories are presented as well as areas for comment with regard to accomplishments in the past year or areas of need for improvement. Evaluation areas consider the provisions of the City Charter as they relate to the respective positions and place them within the context of management, legal and/or administrative principles in municipal government.

Use the following scale to rate the factors listed below:

<u>Distinguished Performance</u>	5
<ul style="list-style-type: none">• This rating describes performance which consistently exceeds job expectations, and reflects a thorough, efficient, and superior effort.	
<u>Commendable Performance</u>	4
<ul style="list-style-type: none">• This rating consistently fulfills the requirements of the job.	
<u>Meets Expectations</u>	3
<ul style="list-style-type: none">• This rating reflects performance which normally meets job expectations.	
<u>Meets Minimum Expectations</u>	2
<ul style="list-style-type: none">• This rating reflects that the person sometimes fails to fulfill the requirements of the job, and improvements are needed.	
<u>Unsatisfactory Performance</u>	1
<ul style="list-style-type: none">• This rating indicates consistently fails to fulfill the requirements of the job.	

City Manager's Annual Evaluation

City Manager Evaluation: Circle the number you believe most closely reflects the performance in each area listed, using the performance description on the previous page (5-Distinguished Performance; 4-Commendable Performance; 3-Meets Expectations; 2-Meets Minimum Expectations; 1-Unsatisfactory Performance).

1. PERSONAL AND PROFESSIONAL SKILLS

- Composure, appearance, lifestyle, conduct or habits, and attitude fitting for an individual in executive position. 1 2 3 4 5
- Invests sufficient efforts toward being diligent and thorough in discharge of duties 1 2 3 4 5
- Knowledgeable of current developments affecting the management field. 1 2 3 4 5
- Has the technical skills necessary for operational competence, especially financial planning and control, administrative analysis, program direction and community planning. 1 2 3 4 5
- Has a capacity for innovation. 1 2 3 4 5
- Anticipates problems and develops effective solutions. Develops alternative approaches in implementing solutions. 1 2 3 4 5
- Willing to try new ideas proposed by Council Members or staff. 1 2 3 4 5
- Participates as necessary in municipal associations/activities at all levels. 1 2 3 4 5
- Maintains rapport with various other governmental jurisdictions and/or agencies. 1 2 3 4 5
- Open to criticism and regards it as a learning experience. Willing to adapt. 1 2 3 4 5

City Manager's Annual Evaluation

- Maintains a high degree of personal integrity. Actions and decisions reflect moral and ethical standards. 1 2 3 4 5
- Viewed with respect by others inside and outside the organization. 1 2 3 4 5
- Effectively utilizes professional seminars and conferences to continuously improve his skills in the profession. 1 2 3 4 5
- Energetic and willing to spend whatever time it takes to do a good job. 1 2 3 4 5
- Tries to understand the values, attitudes and goals of others. 1 2 3 4 5
- Unemotional and unbiased in his decision making. Rational, impersonal viewpoints based on facts and qualified opinions are used. 1 2 3 4 5

Comments

2. PROVIDES EFFECTIVE SUPPORT TO COUNCIL

- Responds equally to the Mayor and each member of Council, and implements directives of the Council as a whole rather than those of any one Council Member. 1 2 3 4 5
- Responds to requests for information, suggestions, or assistance by Council. Is readily available to Council either personally or through designated staff. 1 2 3 4 5
- As requested by Council, assists the Council in establishing policy, while acknowledging and understanding that the Council has ultimate authority in policy creation. 1 2 3 4 5

City Manager's Annual Evaluation

- Receptive of constructive criticism and advice. 1 2 3 4 5
- Implements Council action in accordance with the intent of the Council. Supports the action of the Council after a decision has been reached. 1 2 3 4 5
- Enforces City policies. Reviews enforcement procedures periodically to improve effectiveness. 1 2 3 4 5
- Informs the Council of administrative developments. Assists the Council in resolving problems at the administrative level to avoid unnecessary legislative action. 1 2 3 4 5
- Understands the City's laws and ordinances. 1 2 3 4 5
- Offers workable alternatives to the Council for changes in the law when an ordinance or policy proves impractical in actual administration. 1 2 3 4 5
- Provides the Council with accurate and comprehensive reports concerning matters of importance to the City. 1 2 3 4 5
- Reports are generally produced through own initiative rather than only when requested by Council. Reports which relate to problems include pertinent information and offer alternative approaches to resolving problems. 1 2 3 4 5
- Maintains effective communications, both written and verbal, with members of Council. 1 2 3 4 5
- Plans and organizes materials and presentations by himself or by sub-ordinates for the Council (i.e. Council Agenda), in a clear, concise, and comprehensive manner. 1 2 3 4 5
- Prepares a balanced budget reflective of the requirements of the City organization to provide services at a level intended by Council. Suggests appropriate use of available funds, conscious of the need to operate the City efficiently and effectively. 1 2 3 4 5

City Manager's Annual Evaluation

- Proposed budget is in an intelligent format. Provides guidance and assistance to Council during the budget process. 1 2 3 4 5
- Prepares a Capital Improvement Program which reflects efficient, effective systematic planning for the future. 1 2 3 4 5
- Assists the Council in setting short-term and long-term goals for the City. 1 2 3 4 5

Comments

3. CONTINUES TO IMPROVE QUALITY SERVICES TO CITIZENS

- Maintains an interest in and devotion to the community and its citizens. Takes an appropriate part in community activities. 1 2 3 4 5
- Willing to meet with members of the community and discuss their interests and concerns. 1 2 3 4 5
- Effectively communicates Council policies and directives to the public. 1 2 3 4 5
- Works with the news media to inform the media about City activities and Council's policies. 1 2 3 4 5
- Displays skills for effective relations with various "types" of public (i.e. media, business community, civic groups, etc.) 1 2 3 4 5
- Either personally or through designated staff, effectively works with outside agencies and other units of government with regard to managerial performance and intergovernmental relations. 1 2 3 4 5
- Either personally or through designated staff, is responsive to citizen complaints or suggestions, and handles them in a proper and timely manner. 1 2 3 4 5

City Manager's Annual Evaluation

- Attempts to insure that an attitude and feeling of helpfulness, courtesy and sensitivity to public perception exists in all coworkers. 1 2 3 4 5
- Establishes and maintains an image of the City to the community that represents quality services, vitality and professionalism. 1 2 3 4 5
- Attitude of the community toward the Manager is one of integrity, credibility, and ability. 1 2 3 4 5

Comments

4. SUPERVISE CITY OPERATIONS

- Encourages department heads to make decisions within their own jurisdiction without his/her specific review and approval, yet maintains general control of administrative operations. 1 2 3 4 5
- Instills confidence and initiative in subordinates and emphasizes support rather than restrictive controls for their program. 1 2 3 4 5
- Has developed a friendly and informal relationship with the work force as a whole, yet maintains the prestige and dignity of the City Manager's office. 1 2 3 4 5
- Evaluates personnel periodically and points out staff weaknesses and strengths. Takes corrective action as necessary to improve staff activities and operations. 1 2 3 4 5
- Takes responsibility for setting realistic and pertinent goals for organization. Strives to make the organization action or results oriented. 1 2 3 4 5
- Displays flexibility in his leadership style. 1 2 3 4 5

City Manager's Annual Evaluation

- Has the capability and willingness to make hard choices/decisions when required or necessary. 1 2 3 4 5
- Accepts full responsibility and accountability for decisions and actions of subordinates. 1 2 3 4 5
- Has the ability to effectively motivate groups and individuals. 1 2 3 4 5
- Knowledgeable of City laws and ordinances and others that affect municipal operations. 1 2 3 4 5
- Effective in recruiting, selecting, directing, and developing staff members who report to him. 1 2 3 4 5
- Demonstrates the ability to develop and present new ideas, procedures, or processes, and strives to create an environment that promotes innovation and accomplishment. 1 2 3 4 5
- Keeps the Council informed of legislative trends, as well as new technologies and methods related to City activities. 1 2 3 4 5

Comments

What accomplishments are of note for the City Manager this past year?

What areas need the most improvement? Why? What constructive, positive ideas can you offer the City Manager to improve these areas?

City Manager's Annual Evaluation

Please identify any changes you would like to see the City Manager make regarding leadership style, interpersonal relations, community relations, or managerial effectiveness.

Please list and prioritize goals and objectives for the City Manager for the upcoming year:

Please attach sheets if necessary.

EVALUATOR: _____

Signature

Date

M E M O R A N D U M

To: All Using Agencies
From: R.L.Black, Range Rider *R.L.B.*
Subject: Explanation of Manager Evaluation Form
Date: Sept. 4, 1997

RECEIVED
SEP 8 1997

FLORIDA LEAGUE OF CITIES

The enclosed Evaluation Form prepared for and used by the City Commission of the City of Lauderhill may well serve as a model with appropriate modifications, for any City operating under the Council/Manager plan desiring to evaluate the performance of their City Manager.

The form includes four major sections or areas of evaluation with criteria under each section as follows:

- I Relations With Governing Body
- II Organizational Relations, including three subsections, Fiscal Management, Personnel Management, and Managing the Organization.
- III Relations With the Public
- IV Relations With Other Governments

A rating scale at the top of the first page of the Evaluation Form provides the basis for evaluating each of the thirty-two criteria included under the four major sections or areas. The scale ranges from "DOES NOT MEET EXPECTATIONS", at the bottom of the rating scale, to "EXCEEDS EXPECTATIONS", at the top of the rating scale.

Numerical values are assigned to the foregoing scale, i.e., 1 through 5, with 1 corresponding to "DOES NOT MEET EXPECTATIONS", and 5 corresponding to "EXCEEDS EXPECTATIONS". Number 3 corresponding to "MEETS EXPECTATIONS, is the midpoint of the scale.

The last sheet of the form provides an "OVERALL" rating entry for Governing Body members to record their comprehensive view or impression of the Manager's performance using the rating scale. It is not recommended to "add up" the 32 numbers recorded under the four major sections or areas and arrive at an average score.

Manager Evaluation Form

Page 2

The following suggestions for conducting the actual evaluation are offered for your consideration:

1. The evaluation should be conducted in a setting where there are as few interruptions as possible, and where all participants are seated at the same level.

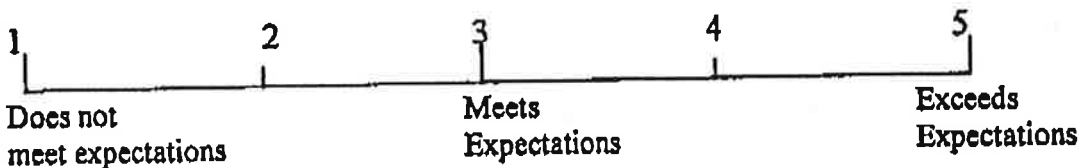
2. The City Manager should be present during the session and complete a self-assessment using the same form as the members of the Governing Body.

3. Governing Body members should complete their Evaluation forms prior to the actual evaluation session.

4. If a facilitator is used(and this is recommended) the completed forms should be reviewed by the facilitator prior to the actual evaluation session.

5. In the process of evaluation, and any discussion by the members of the Governing Body, the focus should be on job-related performance rather than on personal traits of the Manager over the past year-- not just the past month. This point should not be construed as discouraging discussion of some matter of a personal nature which may be affecting the Manager's relationship and/or effectiveness in a negative fashion.

EVALUATION OF CITY MANAGER LAUDERHILL, FLORIDA



I. RELATIONS WITH GOVERNING BODY PROVIDING INFORMATION

1. Keep the Commission informed in an appropriate and timely manner about matters critical to the Commission's policy making role? _____
2. Provide information on an equal basis to all Commission members? _____
3. Anticipate and follow up promptly on Commission requests for information or action without having to be reminded? _____
4. Available to the Commission on official business either personally or through designated subordinates? _____
5. Report departmental and staff activities to the Commission in an appropriate and timely manner? _____
6. Advise the Commission of relevant legislation and developments in the area of public policy affecting the City of Lauderhill? _____
7. Developed, or is in the process of developing, comprehensive understanding of the problems and issues existing in the City of Lauderhill? _____
8. Consider all available alternatives before making recommendations to the Commission? _____
9. Anticipate, plan and prioritize future needs and programs recognizing the potential problems confronting the City? _____

Comments:

II. ORGANIZATIONAL RELATIONS
A. FISCAL MANAGEMENT

- 1. Develop and administer a process of budget preparation and review which meets the requirements of the City Charter, and expectations of the Commission in its decision making role? _____
- 2. Control operational and capital costs through adequate budgetary controls and the judicious/economical utilization of manpower, material and equipment? _____
- 3. Provide the Commission with timely and sufficient reports on the financial status of the City government in accordance with the Charter and requirements of the Commission? _____

Comments:

B. PERSONNEL MANAGEMENT

- 1. Effectuate sound personnel selection and placement policies? _____
- 2. Motivate personnel through leadership and training so that they are increasingly effective in the performance of their duties, in achieving common goals and objectives and in nurturing an attitude of courtesy, helpfulness and sensitivity to the public? _____
- 3. Take disciplinary action when appropriate? _____
- 4. Promote and support the "public service role" for all city employees and emphasizing exemplary performance? _____
- 5. Treat all city personnel in a fair and equitable manner? _____

Comments:

C. MANAGING THE ORGANIZATION

- 1. Execute the policies adopted by the Commission in a timely and appropriate fashion? _____
- 2. Plan and execute organizational priorities in a manner reflective of the city's stated mission and goals, and satisfactory to the Commission? _____
- 3. Analyze organizational problems or issues and identify causes, reasons, implications, and solutions employing all available technologies, systems and methods? _____
- 4. Execute the short and long-term goals and objectives set forth in the City's Mission Statement in a timely and effective manner? _____
- 5. Communicate effective, clearly, easily and to the point? _____

- 6. Demonstrate sensitivity to the opinions and concerns of others in and outside the organization? _____
- 7. Emphasize the importance of teamwork and leadership in his relationship with the organization, and provide a role model for personnel. _____
- 8. Accept new ideas and suggestions for change. _____
- 9. Adapt to and deal effectively with unanticipated conditions and situations? _____

Comments:

III. RELATIONS WITH THE PUBLIC

- 1. Handle disputes or complaints involving citizens in an effective, equitable, and timely manner? _____
- 2. Make himself available and visible to the citizens of Lauderhill in an appropriate manner? _____
- 3. Present Commission policies and positions on issues to the citizens and city organization accurately, equitably, and effectively? _____
- 4. Direct sufficient public credit to the Commission in its role as the Governing Body? _____

Comments:

IV. RELATIONS WITH OTHER GOVERNMENTS

1. Deal effectively with other governmental agencies at all levels in representing the City of Lauderhill? _____
2. Develop and administer an effective program of grantsmanship? _____

Comments:

List any goals, achievements, objectives

Overall Rating
(considering all items above)

Signature

Date

City of St. Pete Beach, Florida

City Manager's Evaluation

Rate each item on the evaluation sheet based on the following scale:

- (1) Poor (2) Fair (3) Good (4) Very Good (5) Excellent

Evaluation of City Manager: _____

Date: _____

NOTE: ADDITIONAL INFORMATION/COMMENTS MAY BE ATTACHED AT THE OPTION OF THE EVALUATOR.

Organizational Management

- 1. Plans and organizes work that implements the policies of the City Commission _____
- 2. Relationship with Department Directors _____

Fiscal Management

- 1. Plans and organizes the preparation of the annual budget with support documentation. _____
- 2. Administers the adopted budget within approved revenues and expenditures as presented in the annual audit. _____
- 3. Plans, organizes, and supervises economic utilization of manpower, materials, and machinery. _____

Planning

- 1. Organizes a process of planning in anticipation of future needs and problems. _____
- 2. Participates in the establishment of reasonable goals/objectives of the City and its departments. _____
- 3. Achieves project schedules (i.e. construction) which are the direct responsibility of the City Manager in a timely and professional manner. _____
- 4. Assists and coordinates with the City Council and staff in the implementation of City projects and agenda action items in order to effectively achieve desired results. _____

City of St. Pete Beach, Florida

City Manager Evaluation

Staffing

- 1. Recruits and retains competent personnel for City positions _____
- 2. Aware of weak and inefficient personnel and works to improve their performance. _____
- 3. Accurately informed and concerned about employee insurance, fringe benefits, promotions and pensions. _____

Supervision

- 1. Encourages Department Directors to make decisions within their own jurisdictions without City Manager approval yet maintains general control of administrative operations. _____
- 2. Instills confidence and initiative in subordinates and emphasizes support rather than restrictive controls for their programs. _____
- 3. Has developed a friendly and informal relationship with the work force as a whole yet maintains the prestige and dignity of the City Manager's office. _____

Relations with Council

- 1. Responds to requests for information or assistance by the Commission. _____
- 2. Informs all Commission members of important issues and developments. _____
- 3. Receptive to constructive criticism and advice. _____
- 4. Carries out the directives of the Commission as a whole rather than those of any individual Commission member. _____
- 5. The Manager assumes responsibility for staff performance. _____

Reporting

- 1. Provides the Commission with reports concerning matters of importance to the City. _____
- 2. Reports are accurate and comprehensive. _____

City of St. Pete Beach, Florida

City Manager Evaluation

Citizen and Intergovernmental Relations

- 1. Handles citizens' complaints and questions in professional an prompt manner _____
- 2. Willingness to meet with members of the community and discuss issues of concern. _____
- 3. Cooperates with neighboring communities and maintains open communications with other municipalities in areas that may affect or relate to the City. _____

Professional/Personal Characteristics

- 1. Invests sufficient effort and time in being diligent and thorough in the performance of job responsibilities. _____
- 2. Willingness to attend seminars/conferences to be kept informed on new legislation, methods and techniques. _____
- 3. Personal appearance. _____
- 4. Professional presence - Ability to adequately represent the City with other units of governments, professional associations and civic groups/organizations. _____

Council Observations

- 1. During the coming year, in what can the City Manager take the greatest pride? What do you feel are his strongest points and his finest accomplishments this past year?

- 2. During the coming year, in what areas do you feel most need improvement? Why? Do you have any constructive, positive ideas as to how the City Manager can improve?

City of St. Pete Beach, Florida

City Manager Evaluation

3. Two things that the Manager does now that I would most like him to continue:

- A. _____

- B. _____

4. Two things that the Manager does now that I would most like him to discontinue:

- A. _____

- B. _____

5. Two things that the Manager does not do now that I would like him to do:

- A. _____

- B. _____

6. Two issues that I would like to see the Manager concentrate on within the next twelve months:

- A. _____

- B. _____

Signature

Date

Confidential
City Manager Performance Evaluation
City Of Garden City, Kansas

Rate from 1-10, 10 being excellent

<u>Responsibility or Characteristic</u>	<u>Circle Rating</u>
General Administration	
Manpower Development: Does he/she appoint and train effective subordinates? Is he/she able to recruit and retain quality employees?	1 2 3 4 5 6 7 8 9 10
Leadership: Does he/she motivate others to maximum performance? Is he/she respected as demanding but fair? Does he/she get enthusiastic response to his/her new ideas and needed reorganizations?	1 2 3 4 5 6 7 8 9 10
Supervision: Does he/she adequately supervise and direct the activities of the Department Heads and staff? Is he/she able to control the operational activities of the City through others? Is he/she available to his/her employees for guidance and counseling? Does he effectively develop Department Heads and staff people?	1 2 3 4 5 6 7 8 9 10
Job Organization: Does he/she delegate responsibility effectively? Does he/she use his/her time productively? Does he/she program activities in an orderly and systematic way?	1 2 3 4 5 6 7 8 9 10
Execution of Policy: Does he/she understand and comply with the overall policies, laws and philosophy of the City? Do his/her efforts lead towards successful accomplishment of goals? Does he/she measure results against goals and take corrective action?	1 2 3 4 5 6 7 8 9 10
Planning: Does the Manager translate policies and objectives into specific and effective programs? Does the Manager independently recognize problems, develop relative facts, formulate alternate solutions and decide on appropriate recommendations.	1 2 3 4 5 6 7 8 9 10
Budget: Is the budget developed in a systematic and effective manner? Is the budget proposal for the Manager normally reasonable and appropriate? Does he/she carry out the budget satisfactorily and control expenses within the levels set in the budget?	1 2 3 4 5 6 7 8 9 10
Communication: Does he/she keep appropriate people informed? Does he/she present his/her thoughts in an orderly and understanding manner? Is he/she able to be persuasive?	1 2 3 4 5 6 7 8 9 10
Reporting: Does he/she submit accurate and complete staff reports on schedule? Do the reports adequately convey information on the City?	1 2 3 4 5 6 7 8 9 10
Commission Communication: Does the Manager provide the Commission with adequate information to make decisions?	1 2 3 4 5 6 7 8 9 10
Written Communication: How effective are the Manager's letters, memoranda and other forms of written information?	1 2 3 4 5 6 7 8 9 10

Response to Commission: Does the Manager respond in a positive way to suggestions and guidance from the Commission? Is the Manager attuned to the Commissions attitudes, feelings and needs?

1 2 3 4 5 6 7 8 9 10

Productivity: Can the Manager be depended on for sustained productive work? Does the Manager readily assume responsibility? Does the Manager meet time estimates within his/her control?

1 2 3 4 5 6 7 8 9 10

Stress Management: Is the Manager able to resolve problems under strain and unpleasant conditions? How well does the Manager tolerate conditions of uncertainty? Does the Manager respond well to stressful situations and adequately deal with the stress inherent to the position?

1 2 3 4 5 6 7 8 9 10

External Relationships

Community Relations: Is the Manager skillful in his/her dealing with the News media? Does he/she properly avoid politics and partisanship? Does he/she show an honest interest in the community? Does he/she properly convey the policies and programs of the City?

1 2 3 4 5 6 7 8 9 10

Community Reputation: What is the general attitude of the community to the Manager? Is he/she regarded as person of high integrity and ability? Is his/her public credibility an asset or liability to the City?

1 2 3 4 5 6 7 8 9 10

Professional Reputation: How does the Manager stand among his/her colleagues? Does he/she deal effectively with other public managers? Is he/she respected by professional and staff representatives of other cities and counties? Does he/she attend and participate in seminars and conferences for professional development?

1 2 3 4 5 6 7 8 9 10

Intergovernmental Relations: Does the Manager work effectively with federal, state, and other local government representatives? Is the relationship with other local government officials beneficial to the City? Is he/she able to facilitate cooperative efforts among various local agencies and the City?

1 2 3 4 5 6 7 8 9 10

Personal Characteristics

Imagination: Does he/she show originality in approaching problems? Does he/she create effective solutions? Is he/she able to visualize the implications of various alternatives?

1 2 3 4 5 6 7 8 9 10

Objectivity: Is he/she unemotional and unbiased? Does he/she take a rational and impersonal viewpoint based on facts and qualified opinions? Is he/she able to divide his/her personal feelings from those which would most effectively convey the City's interest?

1 2 3 4 5 6 7 8 9 10

Drive: Is the Manager energetic and willing to spend the time necessary to do a good job? Does he/she have good initiative and is he/she a self-starter? Does he/she have good mental and physical stamina?

1 2 3 4 5 6 7 8 9 10

Judgment and Decisiveness: Is he/she able to reach quality decisions in a timely fashion? Are his/her decisions generally good? Does he/she exercise good judgment in making decisions and in his/her general conduct?

1 2 3 4 5 6 7 8 9 10

Attitudes: Is he/she enthusiastic? Cooperative? Willing to adapt? Does he/she have an enthusiastic attitude toward the City, both professional and personally?

1 2 3 4 5 6 7 8 9 10

Integrity: Does the Manager fulfill his/her responsibilities and duties in accordance with the ICMA Code of Ethics? Is he/she honest and forthright in his/her professional capacities? Does he/she have a reputation in the community for honesty and integrity?

1 2 3 4 5 6 7 8 9 10

Self-Assurance: Is the Manager self-assured of his/her abilities? Is he/she able to be honest with himself /herself and take constructive criticism? Does he/she take responsibility for mistakes which are his/her? Is he/she confident enough to make decisions and take actions as may be required without undue supervision from the Commission?

1 2 3 4 5 6 7 8 9 10

Composite Performance Rating

General Administration _____

External Relationships _____

Personal Characteristics _____

STRONG POINTS

WEAK POINTS

SUGGESTIONS AND SPECIFIC DIRECTION

GENERAL COMMENTS/DIRECTION FOR IMPROVEMENT

CITY OF NEW BRIGHTON, MINNESOTA
Evaluation of Chief Executive Officer

Explanations and Directions

Performance Evaluation as Team Building

Evaluation as Team Building

If an evaluation is to be, in the truest sense, a means of team building, certain conditions must prevail. The two processes must be compatible and interrelated in the following ways:

1. Evaluation is basically a means, not an end in itself.
2. The trust level between the evaluatee and evaluators must be high.
3. The roles each are to fulfill must be clearly indicated and accepted.
4. Responsibilities are matched with pre-determined standards of performance.

Definition of Roles

A. City Council

1. Conduct annual assessments of performance of the Chief Executive Officer (CEO).
2. Respect the prerogatives of the CEO insofar as operation management function of the organization is concern and the policy function of the Council.
3. Make assessments in general terms except in instances where specific improvements are needed or when explicit commendations are due.

B. Chief Executive Officer

1. Accepts the prospects of annual evaluation.
2. Understands the scope and thrust of the evaluations.
3. Expects the evaluations to adhere to the established procedures for evaluating the performance of the CEO.

Pre-determined Performance Standards

A performance standard is defined as a condition that will exist when a responsibility or function is successfully performed. It is essential that a performance standard be established, at the outset, for each of the eight major areas of responsibility of the CEO. This is necessary in order to use the rating scale effectively.

Major Areas of Responsibility

It should be reiterated that in determining the appropriate level of expectations, actual performance must be measured in relation to the indicated standard of performance. Eight major areas of responsibility as the basis upon which assessment are to be made. Descriptors as provided under each to clarify the meaning and content of the area. However, the evaluation is made of the major area.

Rating Symbols

Rating symbols are used to make assessments; and these symbols fall into three main categories:

E = Exceeds Expectations (performance has been above reasonable expectations)

M = Meets Expectations (performance has attained a level of reasonable expectations)

B = Below Expectations (performance has been below reasonable expectations)

To allow for further refinement of these assessments, each of the three categories can be indicated with a (+) or (-) symbol. This allows for a continuum of nine rating categories from B- which indicates the lowest rating to E+ which indicates truly exemplary performance.

As indicated earlier, without more precise definition of the term "expectations", it is possible that ambiguity will result in the use of the term. In order to help avoid this possibility, the concept of performance standards is used.

It will be noted that in connection with each area, a performance standard is stated, including the condition that have to be met in order to decide the extent to which the "expectations" have been met.

EIGHT MAJOR AREAS OF RESPONSIBILITY

- I. Organizational Management
- II. Fiscal/Business Management
- III. Program Development and Follow-Through
- IV. Relationship with the Mayor/Council
- V. Long Range Planning
- VI. Relationship with Public/Public Relations
- VII. Intergovernmental Relations
- VIII. Professional/Personal Development

<u>RATING</u>	<u>RESPONSIBILITY</u>	<u>PERFORMANCE STANDARD</u>
<u> </u> E+	I. Organizational Management	Organizational Management will be considered effective when a majority of the conditions have been successfully fulfilled.
<u> </u> E		
<u> </u> E-	<i>Plans and organizes the work that goes into providing services established by past and current decisions of the Council.</i>	a. <i>Well qualified, promising persons are recruited and employed.</i>
<u> </u> M+		b. <i>Employees are appropriately placed contributing to a high retention rate.</i>
<u> </u> M	<i>Plans and organizes work that carries out policies adopted by the Council and developed by Staff.</i>	c. <i>Supervisory techniques motivate high performance.</i>
<u> </u> M-		d. <i>Complaints to Council are not common.</i>
<u> </u> B+	<i>Plans and organizes responses to public requests and complaints or areas of concern brought to the attention of the Staff by Council and Staff.</i>	e. <i>The organization is aware of new trends in technology.</i>
<u> </u> B		
<u> </u> B-	<i>Evaluation and keeping up with current technology.</i>	
	<i>Selecting, leading, directing, and developing staff members.</i>	

Comments: Observations of Evaluators: (use this space also to indicate the impact upon the teamwork factor)

Suggestions for Improvements: (Specific area(s) that need strengthening)

Commendations: (Area(s) of performance calling for praise/commendation)

Comments of the CEO: (Responses to any of the evaluations/comments/suggestions/commendations)

<u>RATING</u>	<u>RESPONSIBILITY</u>	<u>PERFORMANCE STANDARD</u>
<u> </u> E+	II. Fiscal/ Business Management	Fiscal/Business Management will be considered effective when a majority of the conditions have been successfully fulfilled.
<u> </u> E		
<u> </u> E-	<i>Plans and organizes the preparation of an annual budget with documentation etc. that conforms to guidelines adopted by the Council.</i>	a. <i>Budget preparation and management are thorough and effective.</i>
<u> </u> M+		
<u> </u> M		
<u> </u> M-	<i>Plans, organizes, and administers the adopted budget with approved revenues and expenditures.</i>	b. <i>Cost-effective measures are persistently pursued.</i>
<u> </u> B+		
<u> </u> B	<i>Plans, organizes and supervises most economic utilization of manpower/ materials/machinery.</i>	c. <i>Financial reporting is timely and readily understandable.</i>
<u> </u> B-	<i>Plans and organizes a system of reports for Council that provide most up-to-date data available concerning expenditures and revenue.</i>	d. <i>Physical facilities management is efficient.</i>
	<i>Plans and organizes maintenance City-owned facilities, buildings and/or equipment.</i>	

Comments: Observations of Evaluators: (use this space also to indicate the impact upon the teamwork factor)

Suggestions for Improvements: (Specific area(s) that need strengthening)

Commendations: (Area(s) of performance calling for praise/commendation)

Comments of the CEO: (Responses to any of the evaluations/comments/suggestions/commendations)

<u>RATING</u>	<u>RESPONSIBILITY</u>	<u>PERFORMANCE STANDARD</u>
<u> </u> E+	III. Program Development and Follow Through.	Program planning techniques and procedures will be considered effective when a majority of the conditions have been successfully fulfilled.
<u> </u> E		
<u> </u> E-	<i>Plans and organizes on-going programs and services to City government.</i>	a. <i>Ongoing programs and services are fully responsive to the City's needs.</i>
<u> </u> M+		
<u> </u> M	<i>Plans and organizes work involved by Council and Staff and the reporting of the results of analysis.</i>	b. <i>Monitoring procedures are in place and functioning well.</i>
<u> </u> M-		
<u> </u> B+	<i>Maintains knowledge of current and innovative trends in the area of services being provided by local government, and incorporates that knowledge in program suggestions and research.</i>	c. <i>Measurable outcomes (to the extent possible) are used to determine success in programs planning.</i>
<u> </u> B		
<u> </u> B-	<i>Plans and organizes work assigned by the Council so that it is completed with dispatch and efficiency.</i>	d. <i>The CEO can be depended upon to follow through.</i>
	<i>Plans, organizes and supervises implementation of programs adopted or approved by the Council.</i>	e. <i>Makes most effective use of available Staff talent.</i>

Comments: Observations of Evaluators: (use this space also to indicate the impact upon the teamwork factor)

Suggestions for Improvements: (Specific area(s) that need strengthening)

Commendations: (Area(s) of performance calling for praise/commendation)

Comments of the CEO: (Responses to any of the evaluations/comments/suggestions/commendations)

<u>RATING</u>	<u>RESPONSIBILITY</u>	<u>PERFORMANCE STANDARD</u>
<u> </u> E+	IV. Relationship with Mayor and Council.	Relations with the Mayor/Council will be considered effective when a majority of the conditions have been successfully fulfilled.
<u> </u> E		
<u> </u> E-	<i>Maintains effective communication both verbal and written, with Council</i>	a. <i>Materials, reports, presentations and recommendations are clearly and convincingly made.</i>
<u> </u> M+		
<u> </u> M	<i>Maintains availability to Council, either personally or through designated subordinates.</i>	b. <i>Communications are made in a timely, forthright, and open manner.</i>
<u> </u> M-		
<u> </u> B+	<i>Establishes and maintains a system of reporting to Council current plans and activities of the Staff.</i>	c. <i>Responses to requests are made promptly and completely.</i>
<u> </u> B		
<u> </u> B-	<i>Plans and organize materials for presentations to the Council, either verbally or written, in the most concise, clear, and comprehensive manner possible.</i>	d. <i>Recommendations appear to be thoroughly researched.</i> e. <i>Adequate information is provided to Council to make decisions.</i> f. <i>A system is in place to report to Council current plans, activities, events of the City.</i>

Comments: Observations of Evaluators: (use this space also to indicate the impact upon the teamwork factor)

Suggestions for Improvements: (Specific area(s) that need strengthening)

Commendations: (Area(s) of performance calling for praise/commendation)

Comments of the CEO: (Responses to any of the evaluations/comments/suggestions/commendations)

<u>RATING</u>	<u>RESPONSIBILITY</u>	<u>PERFORMANCE STANDARD</u>
<u> </u> E+	V. Long Range Planning	Strategic planning will be considered effective when a majority of the conditions have been successfully fulfilled. <ol style="list-style-type: none"> a. A well-constructed long-range (strategic) plan is currently in operation. b. Annual operational plans are carried out by Staff members. c. An on-going monitoring process is in operation to attain <u>quality assurance</u> in program and project implementation. d. Program evaluation and personnel evaluation are inter-related with the strategic planning process. e. Legislative knowledge is <u>current and complete</u>.
<u> </u> E		
<u> </u> E-	<i>Maintains a knowledge of new technologies, systems, methods, etc. in relation to City services.</i>	
<u> </u> M+		
<u> </u> M	<i>Keeps Council advised of new and impending legislation and developments in the area of public policy.</i>	
<u> </u> M-		
<u> </u> B	<i>Plans and organizes a process of program planning in anticipation of future needs and problems.</i>	
<u> </u> B+		
<u> </u> B-	<i>Establishes and maintains an awareness of developments occurring within other cities or other jurisdictions that may have an impact on City activities.</i> <i>Plans, organizes and maintains a process for establishing community goals to be approved or adopted by Council and monitoring and status reporting.</i>	

Comments: Observations of Evaluators: (use this space also to indicate the impact upon the teamwork factor)

Suggestions for Improvements: (Specific area(s) that need strengthening)

Commendations: (Area(s) of performance calling for praise/commendation)

Comments of the CEO: (Responses to any of the evaluations/comments/suggestions/commendations)

<u>RATING</u>	<u>RESPONSIBILITY</u>	<u>PERFORMANCE STANDARD</u>
<u> </u> E+	VI. Relationship with Public/Public Relations.	Communication services will be considered effective when a majority of the conditions have been successfully fulfilled.
<u> </u> E		
<u> </u> E-	<i>Plans, organizes and maintains training of employees in contact with the public, either by phone or in person.</i>	a. <i>Contacts with the media are timely and credible.</i>
<u> </u> M+		
<u> </u> M		
<u> </u> M-	<i>Ensures that an attitude and feeling of helpfulness, courtesy, and sensitivity to public perception exists in employees coming in contact with the public.</i>	b. <i>Publications are varied and consistently well-received by the citizens.</i>
<u> </u> B+		c. <i>Feedback from the public and the community leadership is positive.</i>
<u> </u> B	<i>Establishes and maintains an image of the City to the community that represents service, vitality and professionalism.</i>	d. <i>City has good image with comparable organizations.</i>
<u> </u> B-	<i>Establishes and maintains a liaison with private non-governmental agencies, organizations and groups involved in areas of concern that relate to services or activities of the City.</i>	

Comments: Observations of Evaluators: (use this space also to indicate the impact upon the teamwork factor)

Suggestions for Improvements: (Specific area(s) that need strengthening)

Commendations: (Area(s) of performance calling for praise/commendation)

Comments of the CEO: (Responses to any of the evaluations/comments/suggestions/commendations)

<u>RATING</u>	<u>RESPONSIBILITY</u>	<u>PERFORMANCE STANDARD</u>
<u> </u> E+	VII. Intergovernmental Relations	Intergovernmental relations will be considered effective when a majority of the conditions have been successfully fulfilled.
<u> </u> E		
<u> </u> E-	<i>Maintains awareness of developments and plans in other jurisdictions that may relate to or affect City government.</i>	a. <i>Sufficient activity with municipal and professional organizations.</i>
<u> </u> M+		b. <i>Regarded as leader by municipal officials.</i>
<u> </u> M	<i>Establishes and maintains a liaison with other governmental jurisdictions in those areas of service that improve or enhance the the City's programs.</i>	c. <i>Provides examples of good ideas from other jurisdictions.</i>
<u> </u> M-		d. <i>Positive relationship with surrounding cities.</i>
<u> </u> B+	<i>Maintains communications with governmental jurisdictions with which the City is involved or interfaces.</i>	e. <i>Good cooperation with County and State agencies.</i>
<u> </u> B		
<u> </u> B-		

Comments: Observations of Evaluators: (use this space also to indicate the impact upon the teamwork factor)

Suggestions for Improvements: (Specific area(s) that need strengthening)

Commendations: (Area(s) of performance calling for praise/commendation)

Comments of the CEO: (Responses to any of the evaluations/comments/suggestions/commendations)

<u>RATING</u>	<u>RESPONSIBILITY</u>	<u>PERFORMANCE STANDARD</u>
<u> </u> E+	VIII. Professional/Personal Development.	Professional and personal competencies will be considered effective when a majority of the conditions have been successfully fulfilled.
<u> </u> E		
<u> </u> E-	<i>Maintains awareness and value of broadening professional and personal development.</i>	a. <i>Management techniques show evidences of innovation, imagination, and decisiveness.</i>
<u> </u> M+		
<u> </u> M	<i>Demonstrates imaginative leadership initiatives.</i>	b. <i>Synergetic techniques are fostered.</i>
<u> </u> M-		
<u> </u> B+	<i>Ability to build cohesiveness in Staff.</i>	c. <i>Verbal communication is commendable.</i>
<u> </u> B	<i>Decisiveness in leadership performance.</i>	
<u> </u> B-	<i>Effectiveness in the verbal Communications.</i>	

Comments: Observations of Evaluators: (use this space also to indicate the impact upon the teamwork factor)

Suggestions for Improvements: (Specific area(s) that need strengthening)

Commendations: (Area(s) of performance calling for praise/commendation)

Comments of the CEO: (Responses to any of the evaluations/comments/suggestions/commendations)

City Manager

City of Albany Human Resources Department
250 Broadalbin S.W. Suite 200
Albany, OR 97321
Tel: (503) 967-4300

CITY OF ALBANY MANAGEMENT PERFORMANCE AND DEVELOPMENT EVALUATION FOR THE CITY MANAGER

PURPOSE

In order to establish and maintain effective City Council and City Manager relations, it is essential that the Council establish an ongoing evaluation process that offers an opportunity for each party to review the performance of the Manager. This evaluation should focus on how effectively the Manager is accomplishing the goals established by the Council and how she/he is carrying out her/his responsibilities in key performance areas.

Specifically, the evaluation should serve the following needs:

- (1) Allow the City Manager and the Council to test, identify, and refine their respective roles, relationships, expectations of responsibilities to each other.
- (2) Allow discussion of the City Manager's strengths and weaknesses as demonstrated by past performance with the objective of increasing the Manager's effectiveness; that is, give the Council the opportunity to provide positive feedback in areas that have been handled well and to clarify areas where the Manager could become more effective through improved performance.

PROCESS

- (1) One month before the evaluation is scheduled, the City Manager completes the City Manager's Self-Evaluation Form.
- (2) Two weeks before the evaluation is scheduled, the Mayor will provide each Councilor with a copy of the evaluation form and the completed City Manager Self-Evaluation Form.
- (3) Each Councilor and the Mayor completes an evaluation form, signs it, and returns one copy to the Mayor
- (4) The Mayor tabulates the results of the evaluation forms.
- (5) The composite evaluation of the Mayor and City Council, along with the City Manager's Self Evaluation Form, are distributed by the Mayor to the Council prior to the executive session evaluation meeting. A copy of the composite evaluation is provided by the Mayor to the City Manager prior to the evaluation meeting.
- (6) The Mayor and Council meet with the City Manager in executive session to jointly review the evaluation.
- (7) The operating ground rules shall be established by the Mayor and Council for the executive session including, but not limited to, such considerations as location, time, or time considerations for any particular subject matter.
- (8) The evaluation process shall occur in December of each year, except that the Council may require an additional evaluation at any time during the year.
- (9) Following the evaluation, the City Manager shall present to the Mayor any requests regarding changes to the Employment Agreement including salary adjustments with the Council-authorized "Executive Salary Schedule."
- (10) In executive session, the Mayor shall present to the City Council the City Manager's Employment Agreement adjustment requests. At the executive session, the Mayor shall also solicit

additional adjustment suggestions from the Council. At any point during the executive session, the Council may choose to excuse the City Manager from deliberations regarding these items. Following the reaching of a majority consensus on any adjustments, the Council shall inform the Manager of its pending decision in executive session and then reconvene in open session to ratify the changes.

INSTRUCTIONS

Attached is the evaluation form for the City Manager. It encompasses three primary areas: (1) evaluation of key performance areas; (2) goal accomplishments as well as establishing future goals; and (3) general strengths and areas for improvement.

The rating system for key performance areas has been established for an "exceeds standards," "meets standards," or "fails to meet standards" determination by the evaluator.

A space has been provided for each performance area to include your comments. Each person preparing the form is encouraged to select specific examples of why a particular rating has been chosen. The comments included should give the City Manager enough information to correct problem areas and allow her/him to place specific items on her/his work plan for the following year.

Upon completion of the form, please return it to the Mayor for tabulation.

CITY MANAGER SELF-EVALUATION FORM

The response to the questions on this form should be completed and provided to the City Council two weeks before their evaluations of the Manager are due. Additional pages may be added as needed. Your comments on these self-evaluation questions will be attached to the performance evaluation.

1. What progress have you made in accomplishing your goals and/or work assignments since your last evaluation?
2. What other job-related accomplishments have you had that were not part of the goals set at your last evaluation?
3. What obstacles or setbacks did you encounter during the year?
4. What do you see as your major goals for this next evaluation period?
5. What can the Council do to help you accomplish these goals?
6. What suggestions do you have for improving the effectiveness between you and the Council?
7. Do you have specific training needs which the Council can facilitate, and how will these needs help you in meeting your goals?
8. Are there any other issues or comments you wish to share?

City Manager's Signature _____

DATE _____

CITY OF ALBANY

CITY MANAGER PERFORMANCE EVALUATION FORM (If additional pages are needed for comments, please attach them.)

1. Communication with Council, including effective written and oral presentation and openness to Mayor and Council feedback or direction.

- Exceeds Standards
- Meets Standards
- Fails to Meet Standards

2. Implementation of Council policy and assists Council in the development of annual and long-range goals.

- Exceeds Standards
- Meets Standards
- Fails to Meet Standards

3. Staff support for Council, anticipates and provides reports and recommendations as required by the Council.

- Exceeds Standards
- Meets Standards
- Fails to Meet Standards

4. Staff relations; demonstrates leadership and promotes professional performance.

- Exceeds Standards
- Meets Standards
- Fails to Meet Standards

5. Financial planning and administration; prepares and administers annual budget, which maintains a multiyear vision.

- Exceeds Standards
- Meets Standards
- Fails to Meet Standards

6. Personal and professional development, strives to maintain current knowledge and skill levels.

- Exceeds Standards
- Meets Standards
- Fails to Meet Standards

7. Effective delivery of City services and community relations.

- Exceeds Standards
- Meets Standards
- Fails to Meet Standards

8. Intergovernmental relationships at the state and local levels.

- Exceeds Standards
- Meets Standards
- Fails to Meet Standards

9. Overall evaluation of City Manager's performance.

- Satisfactory
- Unsatisfactory

10. Accomplishments: Has the City Manager accomplished or worked toward accomplishing the goals established by the Council? Why or why not?

11. Strengths: Based upon your overall evaluation of the City Manager, what areas would you list as her/his strong points as a manager?

12. Improvements suggested: Based upon your evaluation, what areas would you suggest the City Manager work on to improve her/his skills and to be more effective in specific areas or situations?

13. Goals for next year: What are the major goals on which (he City Manager needs to. focus in the coming year?

Evaluator's Signature _____ Date _____

CITY OF ALBANY

CITY MANAGER

GENERAL PURPOSE: Performs high level administrative, technical, and professional work in directing and supervising the administration of city government.

SUPERVISION RECEIVED: Works under the broad policy guidance of the City Council.

SUPERVISION EXERCISED: Exercises supervision over all municipal employees either directly or through subordinate supervisors.

ESSENTIAL FUNCTIONS AND RESPONSIBILITIES:

1. Manages and supervises all departments, agencies, and offices of the City to achieve goals within available resources; plans and organizes workloads and staff assignments; trains, leads, and evaluates assigned staff; reviews progress and directs changes as needed.
2. Provides leadership and direction in the development of short and long-range plans; gathers, interprets, and prepares data for studies, reports, and recommendations; coordinates department activities with other departments and agencies; as needed.
3. Provides professional advice to the City Council and department heads; makes presentations to councils, boards, commissions, civic groups, and the general public.
4. Communicates adopted plans, policies, and procedures to staff and the general public.
5. Assures that assigned areas of responsibility are performed within budget; performs cost control activities; monitors revenues and expenditures in assigned area to assure sound fiscal control; prepares annual budget requests; assures effective and efficient use of budgeted funds, personnel, materials, facilities, and time.
6. Determines work procedures, prepares work schedules, and expedites workflow; studies and standardizes procedures to improve efficiency and effectiveness of operations.
7. Issues written and oral instructions; assigns duties and examines work for exactness, professional presentation, and conformance to policies and procedures.
8. Facilitates positive, professional attitude among workers and resolves grievances.
9. Performs or assists subordinates in performing duties, adjusts errors and complaints.
10. Prepares a variety of studies, reports, and related information for decision-making purposes.
11. Appoints and removes all department heads, officers, and employees of the City, except the Judge and members of the Council.
12. Ensures that all laws and ordinances are executed.
13. Prepares and submits a preliminary annual city budget. Administers the adopted budget of the City.

14. Advises the City Council and Budget Committee of financial conditions and current and future city needs.
15. Attends all meetings of the City Council at which attendance may be required by the Council.
16. Operates a motor vehicle safety and legally.
17. Maintains regular job attendance and adherence to working hours

PERIPHERAL DUTIES:

1. Recommends for adoption by the City Council such measures as the Manager may deem necessary or expedient.
2. Prepares and submits to the City Council such reports as may be required by the Council or deemed advisable by the Manager.

MINIMUM QUALIFICATIONS

Education and Experience:

Graduation from an accredited college or university with a Master's degree in public administration, political science, business management, or a closely related field and five years of experience as a municipal administrator or manager of a public agency or department with related duties; or an equivalent combination of education and experience.

Necessary Knowledge, Skills, and Abilities:

1. Considerable knowledge of modern policies and practices of public administration. Working knowledge of municipal finance, human resources, public works, public safety, and community development.
2. Skill in: preparing and administering municipal budgets; planning, directing, and administering municipal programs; and operation of listed tools and equipment used.
3. Ability to: prepare and analyze comprehensive reports; carry out assigned projects to their completion; communicate effectively verbally and in writing; establish and maintain effective working relationships with employees, city officials, and the public; and efficiently and effectively administer a municipal government.

SPECIAL REQUIREMENTS:

1. Possession of or ability to obtain a valid Oregon driver's license.
2. Must be able to speak, read, and write English language fluently.
3. Qualification standards include a requirement that the individual shall not pose a direct threat to the health or safety of the individual or others in the workplace.

TOOLS AND EQUIPMENT USED: Requires frequent use of personal computer, including word processing and spreadsheet programs; calculator; telephone; copy and fax machines.

PHYSICAL DEMANDS: The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is frequently required to sit and talk or hear. The employee is occasionally required to walk; use hands to finger, handle, or feel objects, tools, or controls; and reach with hands and arms.

The employee must occasionally lift and/or move up to 10 pounds. Specific vision abilities required by this job include close vision and the ability to adjust focus.

WORK ENVIRONMENT: The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The noise level in the work environment is usually moderately quiet.

SELECTION GUIDELINES: Formal application; rating of education and experience; oral interview and reference check; job-related tests may be required.

The duties listed above are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related, or a logical assignment to the position.

The job description does not constitute an employment agreement between the employer and employee and is subject to change by the employer as the needs of the employer and requirements of the job change.

APPROVALS:

Mayor: _____

George Barry, Human Resources Manager

Effective Date: November 1, 1995

Revision History: November 7, 1978