# BIELARSKI





#### Introduction:

The City Commission is responsible for conducting Charter Officer annual evaluations ensuring the Charter contributes to the achievement of the City's mission, vision and goals. Charter Officer performance evaluations shall be conducted after the conclusion of each fiscal year.

The purpose of the Charter Officer evaluation is to provide timely, clear and focused input to the Charter about how well he or she is performing in the key performance areas identified as most critical by the City Commission in achieving the City of Gainesville's strategic objectives.

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Evaluate the Charter Officer's performance for each area of accountability using the rating scale outlined below. Consider all criteria together when forming an impression about the Charter Officer's performance. Add comments you believe provide context to your rating or that would be helpful to the Charter Officer.

		Performance Descriptors and Rating Scale
5	Superior	Work performance consistently exceeds all performance expectations and displays a consistent level of exceptional performance. This is consistent, exceptional performance.
4	Exemplary	Work performance consistently achieves all performance expectations and key elements of performance consistently are carried out in an exceptional manner or sustained periods. This is consistent, outstanding performance.
3	Meets Expectations	Work performance consistently achieves all performance expectations for this factor.
2	Needs Improvement	Work performance on one or more elements is less than expected and requires some improvements to fully meet performance standards.
1	Did Not Meet Expectations	Work performance within this factor is unacceptable. Performance did not meet expected performance standards.

# Ratings 2 or below should include comments and if applicable provide specific suggestions for performance improvement.

#### **Charter Officer Instructions and Next Steps:**

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Charter Officer: E. Bielush	Ti	tle: 6(	<u> </u>	GM	(K)	
Goal(s) If needed use additional goals sheet (						
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Commission Member Comments:	י צר					
Charter Officer: Check self-evaluation rating	1	2	3	4	5	N/A
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Commission Member: Check competency rating	1	2	3	4	5 🕅	N/A□
Commission Member Comments:	perfs	mue				
Charter Officer: Check self-evaluation rating	1	2	3	4	5	N/A
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HR Form 01172019, Rev2020

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Commission Member Comments:	re					
Charter Officer: Check self-evaluation rating	1	2	3	4	5	N/A 🗆
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<ol> <li>Leading and Supervision. Effectively establishes high standards in meeting the vision, mission and</li> </ol>	t goals of the	departme	nt.			iaince, iostel
Commission Member: Check rating	1	2	3	4	5	N/A
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HR Form 01172019, Rev2020



### Additional Goals Sheet

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*Overall Support of City Commission Goals and G	Jbjectives.	Demonstra	ites an und	erstanding	of and sup	ports the
City's philosophy (vision, mission, values); actively pu	irsues an u	nderstandi	ng of organi	zational go	als and ob	jectives and
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Commission Member: Check performance rating	4	ZL	3	4	5	N/A
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Charter Officer: Check self-evaluation rating			-			
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commission member comments.						
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Charter Officer Comments:						
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### Charter Officer Annual Performance Evaluation Form

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Evaluate the Charter Officer's performance for each area of accountability using the rating scale outlined below. Consider all criteria together when forming an impression about the Charter Officer's performance. Add comments you believe provide context to your rating or that would be helpful to the Charter Officer.

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Fiscal Year: 2020	Eval	uator: A	drian Ha	yes-Sant	08	
Charter Officer: Ed Bielarski	Title	: GRU M	Manager			
Goal(s): *Overall Support of City Commission Goals and Object City's philosophy (vision, mission, values); actively pursues how these relate to the Charter Officers' job and departm *Charter to attach Accomplishments Report for Evaluation Describe Goal(s): Discussed in meeting	s an under ent.			-		
Commission Momboy Civelo porformance rating	4 🗖 🗌	2	21			
Commission Member: Circle performance rating	1 🗆	2□	3⊠	4□	5□	N/A□
Charter Officer: Circle self-evaluation rating Charter Officer Comments:	1□	2□	3□	4	5 🗆	N/A□
Competencies: 1. Business Acumen. Understands the business, financi	al status c	f the organ	ization and	l core oper	ational area	of
responsibility; realizes implications of key financial inc	dicators, a	nd uses eco	onomic and	l industry d	ata to accu	rately
diagnose business strengths and weaknesses. Commission Member: Check competency rating	1□	2□	3□	4⊠	5□	N/A 🗆
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Charter Officer: Check self-evaluation rating	1□	2□	3□	4□	5□	N/A□
Charter Officer Comments:						

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2. Communication and Building Relationships. Com constructive feedback, promotes frank and open dis internal and external, promotes collaboration and re the City.	scussions o	n issues. Cu	ltivates a n	etwork of r	elationship	s both
Commission Member: Check competency rating	1□	2□	3⊠	4	5	N/A🗆
Commission Member Comments:						
Charter Officer: Check self-evaluation rating	1□	2□	3□	4□	5 🗆	N/A□
Charter Officer Comments:						

3. Fiscal Management. Prepares a balanced budget t ensuring actions and decisions reflect an appropria	•			•		-
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Commission Member Comments:						
Charter Officer: Check self-evaluation rating	1	2□	3🗆	4	5 🗆	N/A□
Charter Officer Comments:						

4. Integrity. Demonstrates the highest level of inte				-		
upholding the values of the City, challenges ques	stionable wo	rk standard	s and conf	ronts or rep	ports suspic	cious
practices to appropriate leaders or authorities.						
Commission Member: Check competency rating	1	2□	3□	4⊠	5 🗆	N/A
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Charter Officer: Check self-evaluation rating	1□	2□	3□	4	5 🗆	N/A□
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5. Leading and Supervision. Effectively establishe	os strategies ·	to develop :	and maxim	nize employ	ee nerform	ance fost
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#### **Commissioner Johnson Charter Officers Evaluation**

12/23/20

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This has been a challenging year. I appreciate the work of our charter officers to keep the city running. You all have adapted, pivoted when needed, and put the safety of our community builders and neighbors first. You all have done this through stressful events, sometimes with children at home and a host of other responsibilities. You have done this while keeping the goals of a very ambitious and very engaged commission at the forefront. This is not to be taken lightly, and in this regard, you all are s/heroes. Doing an evaluation during the best of times is challenging. In the middle of a global pandemic, it is more than challenging, to say the least. My personal challenge has been distinguishing between what is "normal" during this time, because there is no normal; and balancing my expectations from the beginning of the year until now. With the understanding that there are grey areas, nuance and involve over 2200 community builders that support your work, I offer some of my thoughts.

**Ed Bielarski** has done an effective job as the General Manager. He is knowledgeable in all aspects of the utility and does a good job building and motivating his team of over 1000 employees. Ed has an ability to consistently tell the Commission not what it wants to hear, but what it needs to hear. I believe that this leads to better decision making and a better understanding of the impacts of our decision on the utility. Mr. Bielarski is a big supporter of his team, it is my hope that this support does not lead to blind spots and/or disparate outcomes in the treatment of some employees.

As the newest member of the team, **Ginger Bigbie** has made admirable and quick work of staffing her office. During the time Auditor Bigbie has been with the city, there has been significant progress made on goals. There is also a clear path forward for the function of this office and a very clear willingness and ability to integrate the function of this office with the goals of the commission. I appreciate the non-linear thinking and ways to problem solve that have been exhibited by Ginger Bigbie.

Lee Feldman has done a fantastic job with the strategic action plan for the commission/organization and aligning it with specific projects and outcomes. The issuance of the new 2020 Pension Obligation Funds was an astute decision. Many other decisions made by the city manager are clearly rooted in decades of experience, experience that serves this city well. This experience is also why I am concerned about the level of professionalism the city manager has exhibited (as indicated in recent reports), when leading and working with community builders and charter officers. It is my expectation that a shift will occur in his leadership style, communication, and level of transparency. It is also my hope and expectation that the city manager will actively address cultural problems that have been exacerbated by recent events.

**Omichelle Gainey** has been reliable, consistent and highly effective in managing the roles and duties of her office. She has hired an amazing team that is also highly effective in their jobs. I appreciate the work that her office does that directly impacts the success of the commission, most notably, the policy research team. Clerk Gainey is always looking for ways to improve processes. In 2021, I look forward to progress that will be made as it relates to the board and committees. With an improved process and partnerships, I believe that we can have boards and committees that are reflective of our community.

Teneeshia Marshall has done a great job with the core functions of the Office of Equal Opportunity. Her strengths and abilities are in compliance, investigation and monitoring. As the transition from the Office of Equal Opportunity to the Office of Equity and Inclusion happens, with more responsibilities and an enhanced mission, I look forward to the following; a laser sharp focus on building out effective core equity teams throughout all of general government; a concerted effort to build a functioning racial equity task force; a useful racial equity toolkit and a process about when, where, how and by whom it should be used; and staff to be able to execute the goals as agreed upon by the commission. I believe that with consistent communication, imagination and working collaboratively with charter officers on the goals, we will get to a place we can all be proud of.

Through difficult to navigate situations, Mrs. Marshall has been professional and acted with integrity. Her prior experience in investigations as well as her character have served the city well.

**Nicolle Shalley** is highly ethical and able to provide a balanced view of issues. Although I have never fully understood the boundaries of what is permissible to expect from her office, she seems to do a good job at delegating and balancing the many issues that have a legal component. Providing updates to the commission on where projects are in the pipeline with her office has been helpful. I look forward to the following in 2021; processes put in place for stated goals to happen more expeditiously and/or an established timeline for high priority goals and ordinances; better communication and general assistance for simplistic questions and/or tasks.

As we continue the ambitious work of the city and commission in 2021, I hope that as a team, the charter officers will all assist in Goal 1 of the strategic plan- an equitable community. This aligns with a city racial equity policy and plan. I see this as a function of all of our charter officers working collaboratively and most importantly, a partnership between the office of equity and inclusion and the city manager's office. My hope for this city is a functioning, healthy city as measured by social determinants and a willingness to address poverty in our city. The opportunity gaps are growing with each day that passes, and I believe that the biggest challenges that lie ahead will be the negative outcomes associated with housing, health, education and our food system.

Thank you for all that you all do. None of it is easy, but I appreciate that you all keep on showing up. All of you have the hearts of public servants and want the best for Gainesville.

Sincerely,

**Commissioner Johnson** 



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Fiscal Year: 2020	<b>Evaluator:</b>	POE			
Charter Officer: General Manager	Title: Ma	Yor			
Goal(s) If needed use additional goals sheet (page 5 *Overall Support of City Commission Goals and Objective City's philosophy (vision, mission, values); actively pursues an how these relate to the Charter Officers' job and department *Charter to attach Accomplishments Report for Evaluation F	s. Demonstrates understanding (	of organizat	tanding of : ional goals	and suppo and obje	orts the ctives and
Describe Goal(s): 1. Equitable Community 2. Sustainable Community 3. Great Place to Live & Ferpe 4. Resilient Local Ferenomy 5. Best in Class Neighbor Se Commission Member: Check performance rating	vrices	3	45 -+	5	N/A 🗆
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equity plan-vates contines	eto, be a	a che	vec.	(, 101	
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mission Member: Check Competency rating		2	3	4	594	N/A
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lease see commente	s una					nen
Lease See Connected		2[]	30	4	50	N/A
Fiscal Management. Prepares a balanced budget ensuring actions and decisions reflect an appropri mission Member: Check competency rating	to provide s late level of r 1	ervices at esponsibil	a level directive for a level directive for finan	ted by the cial planni	ng and acci	ounta ,



practices to appropriate leaders or authorities.	10	2	<u> </u>	4		A 6
ommission Member Commonts:					54	
the Gul has built a	Cert	tue a	ef 11	re uf	ilte	1
the Gul has built a hat places a high	DAN	antu	en	integ	nity	
har places a p	F			6		
narter Officer: Check self-evaluation rating	1	2□	3	4	5	N/A
arter Officer Comments:						
I and the word Carpon to a state of the						1
Leading and Supervision. Effectively establishes high standards in meeting the vision, mission and	s strategies	to develop e departme	and maxim	lize employ	ee perform	ance, foste
A set in the set of the set of the	Los i est	174 Novie	and in	W. de Fre		R K A
nmission Member: Check rating	1	2	3	4	5	N/AD
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The GM'S focus on Co matcs the organizate elegate and when to infical decision - me rter Officer: Check self-evaluation rating	entin ticn. be d deine	ucous the t irect	ing nen ey 1	المن بدل با نصالہ باری مار	en to	t ∂ coitc
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The GM's focus on Compates the agains of a compates the again and when to infical decision - me infical decision - me inter Officer: Check self-evaluation rating rter Officer Comments:		2	3 Date:	4	5	1
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Additional Goals Sheet

*Overall Support of City Commission Goals and O City's philosophy (vision, mission, values); actively pur how these relate to the Charter Officers' job and depa *Charter to attach Accomplishments Report for Evalu Goal 2 - Describe Goal(s):	sues an ui irtment.	nderstandir	ites an unde ig of organi	erstanding zational go	of and supp als and obj	oorts the ectives and
All (5) goods are the the coty's strakgie pl	e a	lople	\$ 900	als m	в	
	_					
Commission Member: Check performance rating Commission Member Comments:	1	2	3	4	5	N/A
Charter Officer: Check self-evaluation rating Charter Officer Comments:	1	2	3	4	5	N/A
Goal 3 - Describe Goal(s):						
			ÿ		قہ	
<b>Commission Member: Check performance rating</b> Commission Member Comments:	1	2	3	4	5	N/A
Charter Officer: Check self-evaluation rating Charter Officer Comments:	1	2	3	4	5	N/A

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### Charter Officer - Ed Bielarski Annual Performance Evaluation Form

#### Introduction:

The City Commission is responsible for conducting Charter Officer annual evaluations ensuring the Charter contributes to the achievement of the City's mission, vision and goals. Charter Officer performance evaluations shall be conducted after the conclusion of each fiscal year.

The purpose of the Charter Officer evaluation is to provide timely, clear and focused input to the Charter about how well he or she is performing in the key performance areas identified as most critical by the City Commission in achieving the City of Gainesville's strategic objectives.

The Charter Officer should be evaluated using criteria established by the Commission, aligning with established core competencies, review rating scale criteria and salary adjustment schedules as determined by Human Resources. Human Resources will notify the Commission at least one month in advance of performance evaluation due dates. Annual salary increases will be based on the Charter Officer's performance of established objectives in the prior fiscal year. Any annual awards are made based on market considerations and according to budgetary or fiscal constraints.

#### **Commission Instructions:**

Evaluate the Charter Officer's performance for each area of accountability using the rating scale outlined below. Consider all criteria together when forming an impression about the Charter Officer's performance. Add comments you believe provide context to your rating or that would be helpful to the Charter Officer.

1		Performance Descriptors and Rating Scale
5	Superior	Work performance consistently exceeds all performance expectations and displays a consistent level of exceptional performance. This is consistent, exceptional performance.
4	Exemplary	Work performance consistently achieves all performance expectations and key elements of performance consistently are carried out in an exceptional manner or sustained periods. This is consistent, outstanding performance.
3	Meets Expectations	Work performance consistently achieves all performance expectations for this factor.
2	Needs Improvement	Work performance on one or more elements is less than expected and requires some improvements to fully meet performance standards.
1	Did Not Meet Expectations	Work performance within this factor is unacceptable. Performance did not meet expected performance standards.

# Ratings 2 or below should include comments and if applicable provide specific suggestions for performance improvement.

#### **Charter Officer Instructions and Next Steps:**

- Using the above Rating Scale, the Charter Officer will self-evaluate and rate his or her performance. The Charter Officer should also attach his or her Accomplishments List or Report to the form.
- Charter Officer to submit completed self-evaluation and accomplishments report to Human Resources.
- Charter Officer to schedule individual evaluation discussion meetings with each Commission member to discuss selfevaluation and list of accomplishments. Charters should also be prepared to discuss objectives for next fiscal year.
- After reviewing the Charter Officer self-evaluation and accomplishments report with the Charter Officer, each Commission member will provide an evaluation rating, using the above Rating Scale.
- Following Commission and Charter performance evaluation discussion, completed performance evaluations are returned to Human Resources.
- Human Resources will compile and aggregate all Charter Officer evaluation ratings, coordinate and present for discussion during a publicly noticed Commission meeting. Note: Salary increases are budgeted in a personal services contingency account and recommended salary increases will be processed within established payroll processing timelines.



### Charter Officer - Ed Bielarski Annual Performance Evaluation Form

Fiscal Year: FY20	Eva	luator	: Commi	ssioner ]	Reina Sa	:0
Charter Officer: Ed Bielarski	Titl	e: /	eneral	41	25	
Goal(s) If needed use additional goals sheet (	(page 5):		DELCI	My 202	Gt .	
*Overall Support of City Commission Goals and O City's philosophy (vision, mission, values); actively pu how these relate to the Charter Officers' job and dep *Charter to attach Accomplishments Report for Eval Describe Goal(s):	rsues an unde artment.	rstandin	tes an unde g of organi	erstanding zational go	of and sup bals and obj	ports the ectives an
Commission Member: Check performance rating	1 🗆	2	3□	4	- (S)	
Commission Member Comments:		2	3	4	5EX	N/A
Good understanling of Cit	g needs	and	great	Cou	id m	anagent/
Charter Officer: Check self-evaluation rating	10	2	3	4	5	N/A
<i>ompetencies:</i> Business Acumen. Understands the business, fina responsibility; realizes implications of key financial	incial status of	the orga	anization a	nd core op	erational ar	ea of 🔹
diagnose business strengths and weaknesses.	i indicacor, 5, ai	iu uses e	cononne al	ia industry	data to ac	curately
Commission Member: Check competency rating	1	2	3 🗆	4	500	N/A
		20		4		
	10 ;	<u>د ا</u>	3	41.1	5	N/A
harter Officer: Check self-evaluation rating harter Officer Comments:	10 ;	٤ ــــــــــــــــــــــــــــــــــــ	3	4	5	N/A

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	10	2/1	<u>.</u>
10	-	100	

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# Charter Officer - Ed Bielarski Annual Performance Evaluation Form

Commission Member Comments:		-		425	5 🗋	
made great efforts	to com	min cate	ul	public		<u>N/A</u> [
Charter Officer: Check self-evaluation rating	1	2	3	4	5	N/A
Fiscal Management. Prepares a balanced budge ensuring actions and decisions reflect an appropr	t to provide iate level of	services at responsibi	a level dire lity for fina	cted by the	· Commissi ng and acc	ion, countability
<ol> <li>Fiscal Management. Prepares a balanced budge ensuring actions and decisions reflect an appropr</li> <li>Commission Member: Check competency rating</li> <li>Commission Member Comments:</li> </ol>	t to provide iate level of	services at responsibi	a level dire lity for fina	cted by the ncial planni	e Commissi ng and acc	ion, countability
ensuring actions and decisions reflect an appropr ommission Member: Check competency rating	iate level of	responsibi	lity for fina	ncial planni	ng and acc	ountability

6



# Charter Officer - Ed Bielarski **Annual Performance Evaluation Form**

Commission Member: Check competency rating	1	2	3	4	- 5	1
Commission Member Comments:		4	3	4	5🛛	N/A
Charter Officer: Check self-evaluation rating	1	2	3	4	5	
Charter Officer Comments:			3	4	3	N/A
<ul> <li>Leading and Supervision. Effectively establish high standards in meeting the vision, mission and provide the standards in the st</li></ul>	es strategies t nd goals of the	o develop a departmer	nd maximi nt.	ze employe	ee performa	ance, foste
. Leading and Supervision. Effectively establish	es strategies t nd goals of the 1	o develop a departmer 20	nd maximi ht. 3	ze employe	e performa	ance, foste
• Leading and Supervision. Effectively establish high standards in meeting the vision, mission a commission Member: Check rating	nd goals of the	departmer	nt.			
Leading and Supervision. Effectively establish high standards in meeting the vision, mission an Commission Member: Check rating Commission Member Comments:	nd goals of the	departmer	nt.			N/A
<ul> <li>Leading and Supervision. Effectively establish high standards in meeting the vision, mission an Commission Member: Check rating Commission Member Comments:</li> </ul>	1	departmer	it. <b>3</b> □	4	5	



# Charter Officer - Ed Bielarski Annual Performance Evaluation Form

#### Additional Goals Sheet

*Overall Support of City Commission Goals and O City's philosophy (vision, mission, values); actively pu how these relate to the Charter Officers' job and dep *Charter to attach Accomplishments Report for Eval Goal 2 - Describe Goal(s):	rsues an ui artment. uation Per	nderstandir iod	ites an und ng of organ	erstanding zational go	of and supp als and obj	oorts the ectives and
Lover or stabatize rates f	la creto	wers				
Commission Member: Check performance rating	1 🗆	2	3 🗆	4□	-54	
Commission Member Comments:		2.		9	5	N/A
Charter Officer: Check self-evaluation rating	1	20	3 🗆	4	5	N/A□
<u>Goal 3 - Describe Goal(s):</u>						
Commission Member: Check performance rating Commission Member Comments:	1	2	3	4	5	N/A
Charter Officer: Check self-evaluation rating Charter Officer Comments:	1	2	3	4	5	N/A



#### Introduction:

The City Commission is responsible for conducting Charter Officer annual evaluations ensuring the Charter contributes to the achievement of the City's mission, vision and goals. Charter Officer performance evaluations shall be conducted after the conclusion of each fiscal year.

The purpose of the Charter Officer evaluation is to provide timely, clear and focused input to the Charter about how well he or she is performing in the key performance areas identified as most critical by the City Commission in achieving the City of Gainesville's strategic objectives.

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#### **Commission Instructions:**

Evaluate the Charter Officer's performance for each area of accountability using the rating scale outlined below. Consider all criteria together when forming an impression about the Charter Officer's performance. Add comments you believe provide context to your rating or that would be helpful to the Charter Officer.

		Performance Descriptors and Rating Scale
5	Superior	Work performance consistently exceeds all performance expectations and displays a consistent level of exceptional performance. This is consistent, exceptional performance.
4	Exemplary	Work performance consistently achieves all performance expectations and key elements of performance consistently are carried out in an exceptional manner or sustained periods. This is consistent, outstanding performance.
3	Meets Expectations	Work performance consistently achieves all performance expectations for this factor.
2	Needs Improvement	Work performance on one or more elements is less than expected and requires some improvements to fully meet performance standards.
1	Did Not Meet Expectations	Work performance within this factor is unacceptable. Performance did not meet expected performance standards.

# Ratings 2 or below should include comments and if applicable provide specific suggestions for performance improvement.

#### **Charter Officer Instructions and Next Steps:**

- Using the above Rating Scale, the Charter Officer will self-evaluate and rate his or her performance. The Charter Officer should also attach his or her Accomplishments List or Report to the form.
- Charter Officer to submit completed self-evaluation and accomplishments report to Human Resources.
- Charter Officer to schedule individual evaluation discussion meetings with each Commission member to discuss selfevaluation and list of accomplishments. Charters should also be prepared to discuss objectives for next fiscal year.
- After reviewing the Charter Officer self-evaluation and accomplishments report with the Charter Officer, each Commission member will provide an evaluation rating, using the above Rating Scale.
- Following Commission and Charter performance evaluation discussion, completed performance evaluations are returned to Human Resources.
- Human Resources will compile and aggregate all Charter Officer evaluation ratings, coordinate and present for discussion during a publicly noticed Commission meeting. Note: Salary increases are budgeted in a personal services contingency account and recommended salary increases will be processed within established payroll processing timelines.



Fiscal Year: FY2020	Evaluato	r: GiGi	Simmor	S
Charter Officer: Ed Bielarski			Manage	
Goal(s) If needed use additional goals sheet (page :				
*Overall Support of City Commission Goals and Objectiv City's philosophy (vision, mission, values); actively pursues an how these relate to the Charter Officers' job and department *Charter to attach Accomplishments Report for Evaluation Describe Goal(s):	n understandi 	ates an underst ng of organizat	anding of and supp ional goals and obje	orts the ectives and
Commission Member: Check performance rating	2	3	4 5	N/A
Commission Member Comments: Due De Covid-19 were diffent to act Mis does <u>NOT</u> diminis <u>dedication</u> Put Charter Officer: Check self-evaluation rating	one nie e	geals er con	+ obje - plete.	Haven
This does NOT diminis	h th	e had	a work	+
dedication put	-1-164	1,100	is the.	
Charter Officer: Check self-evaluation rating 1	2	3□	4 5	N/A
<ul> <li><b>Ompetencies:</b></li> <li><b>Business Acumen.</b> Understands the business, financial st responsibility; realizes implications of key financial indications</li> </ul>	atus of the or	ganization and economic and	core operational ar	ea of
diagnose business strengths and weaknesses.				di giteiy
Commission Member: Check competency rating	2	3□	4 5	N/A
commission Member Comments: Ed displayed exceptiona While Navigating the	( bus utilit	y deni	acument Cov	D.
white Mar. South of		V	0	
harter Officer: Check self-evaluation rating	2	3 🗆	4 5	N/A
harter Officer Comments:				
nuter officer comments.				



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internal and external, promotes collaboration an the City.	discussion	s on issues.	Cultivates	a network o	of relations	and giving hips both edibility for
Commission Member: Check competency rating	10	2	30	40	5	N/A
Commission Member Comments:						
Charter Officer: Check self-evaluation rating	1	2	3	4	5	N/AD
Charter Officer Comments:						
<ul> <li>Fiscal Management. Prepares a balanced budget ensuring actions and decisions reflect an appropri</li> </ul>	to provide ate level of	services at responsibil	a level dire ity for fina	cted by the ncial plannin	Commissions and account	on, ountability.
ommission Member: Check competency rating	1	2	3	4	5	
ommission Member Comments:	haller	si bu	, time dget	5- P10	Ed a	
his staff managed	dic	insu	rmoi	intal	ole f	oressi
Under diffen It and C his Staff Managed Exceptional Services Un	der	insu	rmoi	intab	ole (	pressi
his Staff Manajed CXCoptional Services Un harter Officer: Check self-evaluation rating harter Officer Comments:	10	in 5u 20	3	anta l	5□	n/a
harter Officer: Check self-evaluation rating					1	1
harter Officer: Check self-evaluation rating					1	1
harter Officer: Check self-evaluation rating					1	1
narter Officer: Check self-evaluation rating					1	1



				./	-	
Commission Member: Check competency rating	1	2	3 🗆	4	5	N/A
Commission Member Comments:	NA					
Charter Officer: Check self-evaluation rating	1□	2	3	4	5	N/A
				1		
<ul> <li>Leading and Supervision. Effectively establishes high standards in meeting the vision, mission and ommission Member: Check rating</li> </ul>	goals of the	departmer	at.		5	
ommission Member Comments: Ed 5 / Ladership Mis Offanizetian	tra.	nscen	را			
	1	2□	3	4	5	N/A
harter Officer: Check self-evaluation rating						
harter Officer: Check self-evaluation rating						

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### Additional Goals Sheet

*Overall Support of City Commission Goals and C City's philosophy (vision, mission, values); actively pu how these relate to the Charter Officers' job and dep *Charter to attach Accomplishments Report for Eval Goal 2 - Describe Goal(s):	irsues an ui artment.	nderstandi	ates an und ng of organi	erstanding zational go	of and sup pals and ob	ports the jectives and
Commission Member: Check performance rating	1 🗆	2□	3 🗆	4	P [ ]	AL / - 🗖
Commission Member Comments:		٤U	3	*	5	N/A
Charter Officer: Check self-evaluation rating	1	2□	3	4	5 🗌	
Charter Officer Comments: Goal 3 - Describe Goal(s):						N/A 🗆
<b>Commission Member: Check performance rating</b> Commission Member Comments:	1	2	3	4	5	N/A
Charter Officer: Check self-evaluation rating	1	2	3 🗆	4	5	N/A
Charter Officer Comments:						

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Fiscal Year: Fy 2020	Eva	luator:	Ward			
Charter Officer: EDWARD BIELARS	L  Title	e:				
Goal(s) If needed use additional goals sheet	(page 5):					
*Overall Support of City Commission Goals and City's philosophy (vision, mission, values); actively phow these relate to the Charter Officers' job and deg *Charter to attach Accomplishments Report for Eva Describe Goal(s):	ursues an unde	rstanding	of organia	rstanding ational go	of and supp als and obje	orts the sectives and
Commission Member: Check performance rating	1	20	3	4	5	a. ( a. (
Commission Member Comments:	*	*	190		34	N/A
	•		sain main			
Charter Officer: Check self-evaluation rating	1	2	3	4	5	N/A 🗆
Charter Officer Comments:	ancial cratue of	the deriv				
Charter Officer Comments: Dempetencies: Business Acumen. Understands the business, fin- responsibility; realizes implications of key financia diagnose business strengths and weaknesses.	ancial cratue of	the deriv				
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Charter Officer Comments: ompetencies: Business Acumen. Understands the business, fin- responsibility; realizes implications of key financia diagnose business strengths and weaknesses. ommission Member: Check competency rating ommission Member Comments: marter Officer: Check self-evaluation rating	ancial status of al indicators, an	the organ d uses ecc 2	ization ar phomic ar 3	Id core ope Id industry	rational are data to acc	ea of urately N/A
Charter Officer Comments: ompetencies: Business Acumen. Understands the business, fin- responsibility; realizes implications of key financia diagnose business strengths and weaknesses. ommission Member: Check competency rating ommission Member Comments: marter Officer: Check self-evaluation rating	ancial status of al indicators, an	the organ d uses ecc 2	ization ar phomic ar 3	Id core ope Id industry	rational are data to acc	ea of urately N/A
Charter Officer Comments: <b>Dempetencies:</b> <b>Business Acumen.</b> Understands the business, fin- responsibility; realizes implications of key financia diagnose business strengths and weaknesses. <b>Ommission Member: Check competency rating</b> ommission Member Comments:	ancial status of al indicators, an 10 2 AVIARE OF	the organ d uses ecc 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	ization ar onomic ar 30 30 80 80 80 80 80 80 80 80 80 80 80 80 80	d core ope d industry 4 4 3 5 5 7 1 7 1 7	SIM	N/A

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2: Communication and Building Relationships. Communicates and listens effectively, open to receiving and giving constructive feedback, promotes frank and open discussions on issues. Cultivates a network of relationships both\* 计数 internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City. **Commission Member: Check competency rating** 10 2 3 5 N/A Commission Member Comments: I bannue to hope ter more Pastic cogagement External comminications about the excellence Much 6KD Provides **Charter Officer: Check self-evaluation rating** 10 20 3 4 5 🖾 N/A Charter Officer Comments: HAVE FOSTERED WCIRKING RELATIONSHIPS ACROSS CIT'S GONERN MENT AND BETWEEN CHARTER OFFICERS WHICH HAS PROMOTED OPEN & HONEST DIALOGUES TO PROVIDE ADHERENCE TO STRATEGIC VISION OF CITY. FRANKLY, I DON'T BEHEVE THERE HAS BEEN A TIME WHEN GRU WORKED WITH GG MORE EFFICIENTLY THAN TODAY. 3. Fiscal Management. Prepares a balanced budget to provide services at a level directed by the Commission, ensuring actions and decisions reflect an appropriate level of responsibility for financial planning and accountability. 1 . Same . Sale **Commission Member: Check competency rating** 10 20 3 4 🗆 58 N/A Commission Member Comments:

Charter Officer: Check self-evaluation rating	10	2	3[7]	4	5.52	
Charter Officer Comments: The Spirite of The					1.24	INTAL

ADDITIONAL COSTS OF TOTAL REWARDS AND THE LOSS OF REVENUES AS SEEN THRY OUT THE UTILIM JADUSTRY, GRU HAS BEEN ABLE TO PROVIDE THE SERVICES REQUIRED IN A FINANCIALLY PRODENT MANNER,



Commission Members Check and a state	1.0		1			
Commission Member: Check competency rating Commission Member Comments:	1□	2	3	4	54	
Charter Officer: Check self-evaluation rating	10	2	3	4	5	N/A
Charter Officer Comments: I HANE PROVEN	THRU M.	ACTION	KINT	AKE M	d Proce	
CHARTER OFFICER QUITE SCRIDUSLY						
5. Leading and Supervision. Effectively establishes	strategies t goals of the	o develop a departmer	nd maximi nt.	ze employe	e perform	ance, foste
high standards in meeting the vision, mission and	goals of the	departmen	) <b>t.</b>	1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1		1
5. Leading and Supervision. Effectively establishes high standards in meeting the vision, mission and Commission Member: Check rating Commission Member Comments:	goals of the	departmen	nt. H	**************************************		1.
high standards in meeting the vision, mission and Commission Member: Check rating Commission Member Comments:	goals of the	departmen	) <b>t.</b>	1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1		1
high standards in meeting the vision, mission and commission Member: Check rating Commission Member Comments:	goals of the	2	1t. 3	4	58	N/A
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Additional Goals Sheet

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narter Officer: Check self-evaluation rating		2	3 🗆	4	5	

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5

# BIGBIE



#### Introduction:

The City Commission is responsible for conducting Charter Officer annual evaluations ensuring the Charter contributes to the achievement of the City's mission, vision and goals. Charter Officer performance evaluations shall be conducted after the conclusion of each fiscal year.

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#### **Commission Instructions:**

Evaluate the Charter Officer's performance for each area of accountability using the rating scale outlined below. Consider all criteria together when forming an impression about the Charter Officer's performance. Add comments you believe provide context to your rating or that would be helpful to the Charter Officer.

51	1	Performance Descriptors and Rating Scale
5	Superior	Work performance consistently exceeds all performance expectations and displays a consistent level of exceptional performance. This is consistent, exceptional performance.
4	Exemplary	Work performance consistently achieves all performance expectations and key elements of performance consistently are carried out in an exceptional manner or sustained periods. This is consistent, outstanding performance.
3	Meets Expectations	Work performance consistently achieves all performance expectations for this factor.
2	Needs Improvement	Work performance on one or more elements is less than expected and requires some improvements to fully meet performance standards.
1	Did Not Meet Expectations	Work performance within this factor is unacceptable. Performance did not meet expected performance standards.

Ratings 2 or below should include comments and if applicable provide specific suggestions for performance improvement.

#### **Charter Officer Instructions and Next Steps:**

- Using the above Rating Scale, the Charter Officer will self-evaluate and rate his or her performance. The Charter Officer should also attach his or her Accomplishments List or Report to the form.
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- Charter Officer to schedule individual evaluation discussion meetings with each Commission member to discuss selfevaluation and list of accomplishments. Charters should also be prepared to discuss objectives for next fiscal year.
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- Human Resources will compile and aggregate all Charter Officer evaluation ratings, coordinate and present for discussion during a publicly noticed Commission meeting. Note: Salary increases are budgeted in a personal services contingency account and recommended salary increases will be processed within established payroll processing timelines.

Bigbie



Fiscal Year: FV20	F	valuator	DIA	г А	rreola	
Charter Officer: 6 Banie	Т	itle:	~ Aud	10 10 10	liiteoiu	
Goal(s) If needed use additional goals sheet	(page 5):		1 FILMA			
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Charter Officer: Check self-evaluation rating Charter Officer Comments:	1	2	3	4	5	N/A 🗆



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Commission Member Comments:						
Charter Officer: Check self-evaluation rating	1	2	3	4	5	N/A
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#### Additional Goals Sheet

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#### Gainesville. Citizen centered People empowered

### Charter Officer Annual Performance Evaluation Form

#### Introduction:

The City Commission is responsible for conducting Charter Officer annual evaluations ensuring the Charter contributes to the achievement of the City's mission, vision and goals. Charter Officer performance evaluations shall be conducted after the conclusion of each fiscal year.

The purpose of the Charter Officer evaluation is to provide timely, clear and focused input to the Charter about how well he or she is performing in the key performance areas identified as most critical by the City Commission in achieving the City of Gainesville's strategic objectives.

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#### **Commission Instructions:**

Evaluate the Charter Officer's performance for each area of accountability using the rating scale outlined below. Consider all criteria together when forming an impression about the Charter Officer's performance. Add comments you believe provide context to your rating or that would be helpful to the Charter Officer.

		Performance Descriptors and Rating Scale
5	Superior	Work performance consistently exceeds all performance expectations and displays a consistent level of exceptional performance. This is consistent, exceptional performance.
4	Exemplary	Work performance consistently achieves all performance expectations and key elements of performance consistently are carried out in an exceptional manner or sustained periods. This is consistent, outstanding performance.
3	Meets Expectations	Work performance consistently achieves all performance expectations for this factor.
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1	Did Not Meet Expectations	Work performance within this factor is unacceptable. Performance did not meet expected performance standards.

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#### **Charter Officer Instructions and Next Steps:**

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- Human Resources will compile and aggregate all Charter Officer evaluation ratings, coordinate and present for discussion during a publicly noticed Commission meeting. Note: Salary increases are budgeted in a personal services contingency account and recommended salary increases will be processed within established payroll processing timelines.

Fiscal Year: 2020	Eval	uator: A	drian Ha	yes-Sant	OS	
Charter Officer: Ginger Bigbie	Title	: Audito	)r			
Goal(s): *Overall Support of City Commission Goals and Objec City's philosophy (vision, mission, values); actively pursues how these relate to the Charter Officers' job and departm *Charter to attach Accomplishments Report for Evaluation Describe Goal(s): Discussed in meeting	s an under ent.			-		
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Commission Member: Circle performance rating	1 🗆	2□	3□	4□	5⊠	N/A□
Charter Officer: Circle self-evaluation rating	1□	2□	3□	4	5□	N/A□
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1. Business Acumen. Understands the business, financial incomparishibitur realizes implications of key financial inc		-		-		
responsibility; realizes implications of key financial inc diagnose business strengths and weaknesses.	uicators, a	nu uses eco	onomic and	industry d		ately
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Commission Member Comments:	_		~			
Charter Officer: Check self-evaluation rating	1□	2□	3□	4□	5□	N/A□
Charter Officer Comments:						

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# **Charter Officer Annual Performance Evaluation Form**

2. Communication and Building Relationships. Com constructive feedback, promotes frank and open dis internal and external, promotes collaboration and r the City.	scussions or	n issues. Cu	ltivates a n	etwork of r	elationship	s both
Commission Member: Check competency rating	1□	2□	3 🗆	4⊠	5 🗆	N/A□
Commission Member Comments:						
Charter Officer: Check self-evaluation rating	1□	2□	3□	4□	5 🗆	N/A□
Charter Officer Comments:						

3. Fiscal Management. Prepares a balanced budget ensuring actions and decisions reflect an appropri	•			•		
Commission Member: Check competency rating	1□	2□	3□	4⊠	5□	N/A
Commission Member Comments:						
Charter Officer: Check self-evaluation rating	1□	2□	3□	4□	5□	N/A□
Charter Officer Comments:						<u> </u>

4. Integrity. Demonstrates the highest level of inte				-		
upholding the values of the City, challenges ques	stionable wo	rk standard	s and conf	ronts or rep	ports suspic	cious
practices to appropriate leaders or authorities.						
Commission Member: Check competency rating	1	2□	3□	4⊠	5 🗆	N/A
Commission Member Comments:						
Charter Officer: Check self-evaluation rating	1□	2□	3□	4	5 🗆	N/A□
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high standards in meeting the vision, mission and	-	-		inze employ	ee periorii	
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Commission Member Comments:		2	3□ 3□ 3□	4	5	N/A□_

Gainesville.

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FY20 Charter Officer:			John	son		
	r	`itle:				
Goal(s) If needed use additional goals sheet						
*Overall Support of City Commission Goals and C City's philosophy (vision, mission, values); actively pu how these relate to the Charter Officers' job and dep *Charter to attach Accomplishments Report for Eva Describe Goal(s):	irsues an u artment.	nderstanding	es an und ; of organi	erstanding izational go	of and supj als and obj	ports the ectives and
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Charter Officer: Check self-evaluation rating	10	2	3□	40	5	N/A
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Business Acumen: Understands the business, fin responsibility; realizes implications of key financia diagnose business strengths and weaknesses. ommission Member: Check competency rating ommission Member Comments:	il indicator	s, and uses e	conomic a	and industry	data to ac	curately
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HR Form 01172019,Rev2020

#### **Commissioner Johnson Charter Officers Evaluation**

12/23/20

FY 20

This has been a challenging year. I appreciate the work of our charter officers to keep the city running. You all have adapted, pivoted when needed, and put the safety of our community builders and neighbors first. You all have done this through stressful events, sometimes with children at home and a host of other responsibilities. You have done this while keeping the goals of a very ambitious and very engaged commission at the forefront. This is not to be taken lightly, and in this regard, you all are s/heroes. Doing an evaluation during the best of times is challenging. In the middle of a global pandemic, it is more than challenging, to say the least. My personal challenge has been distinguishing between what is "normal" during this time, because there is no normal; and balancing my expectations from the beginning of the year until now. With the understanding that there are grey areas, nuance and involve over 2200 community builders that support your work, I offer some of my thoughts.

**Ed Bielarski** has done an effective job as the General Manager. He is knowledgeable in all aspects of the utility and does a good job building and motivating his team of over 1000 employees. Ed has an ability to consistently tell the Commission not what it wants to hear, but what it needs to hear. I believe that this leads to better decision making and a better understanding of the impacts of our decision on the utility. Mr. Bielarski is a big supporter of his team, it is my hope that this support does not lead to blind spots and/or disparate outcomes in the treatment of some employees.

As the newest member of the team, **Ginger Bigbie** has made admirable and quick work of staffing her office. During the time Auditor Bigbie has been with the city, there has been significant progress made on goals. There is also a clear path forward for the function of this office and a very clear willingness and ability to integrate the function of this office with the goals of the commission. I appreciate the non-linear thinking and ways to problem solve that have been exhibited by Ginger Bigbie.

Lee Feldman has done a fantastic job with the strategic action plan for the commission/organization and aligning it with specific projects and outcomes. The issuance of the new 2020 Pension Obligation Funds was an astute decision. Many other decisions made by the city manager are clearly rooted in decades of experience, experience that serves this city well. This experience is also why I am concerned about the level of professionalism the city manager has exhibited (as indicated in recent reports), when leading and working with community builders and charter officers. It is my expectation that a shift will occur in his leadership style, communication, and level of transparency. It is also my hope and expectation that the city manager will actively address cultural problems that have been exacerbated by recent events.

**Omichelle Gainey** has been reliable, consistent and highly effective in managing the roles and duties of her office. She has hired an amazing team that is also highly effective in their jobs. I appreciate the work that her office does that directly impacts the success of the commission, most notably, the policy research team. Clerk Gainey is always looking for ways to improve processes. In 2021, I look forward to progress that will be made as it relates to the board and committees. With an improved process and partnerships, I believe that we can have boards and committees that are reflective of our community.

**Teneeshia Marshall** has done a great job with the core functions of the Office of Equal Opportunity. Her strengths and abilities are in compliance, investigation and monitoring. As the transition from the Office of Equal Opportunity to the Office of Equity and Inclusion happens, with more responsibilities and an enhanced mission, I look forward to the following; a laser sharp focus on building out effective core equity teams throughout all of general government; a concerted effort to build a functioning racial equity task force; a useful racial equity toolkit and a process about when, where, how and by whom it should be used; and staff to be able to execute the goals as agreed upon by the commission. I believe that with consistent communication, imagination and working collaboratively with charter officers on the goals, we will get to a place we can all be proud of.

....Through difficult to navigate situations, Mrs. Marshall has been professional and acted with integrity. Her prior experience in investigations as well as her character have served the city well.

**Nicolle Shalley** is highly ethical and able to provide a balanced view of issues. Although I have never fully understood the boundaries of what is permissible to expect from her office, she seems to do a good job at delegating and balancing the many issues that have a legal component. Providing updates to the commission on where projects are in the pipeline with her office has been helpful. I look forward to the following in 2021; processes put in place for stated goals to happen more expeditiously and/or an established timeline for high priority goals and ordinances; better communication and general assistance for simplistic questions and/or tasks.

As we continue the ambitious work of the city and commission in 2021, I hope that as a team, the charter officers will all assist in Goal 1 of the strategic plan- an equitable community. This aligns with a city racial equity policy and plan. I see this as a function of all of our charter officers working collaboratively and most importantly, a partnership between the office of equity and inclusion and the city manager's office. My hope for this city is a functioning, healthy city as measured by social determinants and a willingness to address poverty in our city. The opportunity gaps are growing with each day that passes, and I believe that the biggest challenges that lie ahead will be the negative outcomes associated with housing, health, education and our food system.

Thank you for all that you all do. None of it is easy, but I appreciate that you all keep on showing up. All of you have the hearts of public servants and want the best for Gainesville.

Sincerely,

**Commissioner Johnson** 



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	1. A A A A A A A A A A A A A A A A A A A	Performance Descriptors and Rating Scale
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#### **Charter Officer Instructions and Next Steps:**

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- After reviewing the Charter Officer self-evaluation and accomplishments report with the Charter Officer, each Commission member will provide an evaluation rating, using the above Rating Scale.
- Following Commission and Charter performance evaluation discussion, completed performance evaluations are returned to Human Resources.
- Human Resources will compile and aggregate all Charter Officer evaluation ratings, coordinate and present for discussion during a publicly noticed Commission meeting. Note: Salary increases are budgeted in a personal services contingency account and recommended salary increases will be processed within established payroll processing timelines.



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# **Charter Officer Annual Performance Evaluation Form**

Additional Goals Sheet

*Overall Support of City Commission Goals and Ol City's philosophy (vision, mission, values); actively pur- how these relate to the Charter Officers' job and depa *Charter to attach Accomplishments Report for Evalu Goal 2 - Describe Goal(s):	sues an und rtment. ation Perio	lerstandi d	ng of organiz	ational g	oals and obj	ectives and -
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#### Introduction:

The City Commission is responsible for conducting Charter Officer annual evaluations ensuring the Charter contributes to the achievement of the City's mission, vision and goals. Charter Officer performance evaluations shall be conducted after the conclusion of each fiscal year.

The purpose of the Charter Officer evaluation is to provide timely, clear and focused input to the Charter about how well he or she is performing in the key performance areas identified as most critical by the City Commission in achieving the City of Gainesville's strategic objectives.

The Charter Officer should be evaluated using criteria established by the Commission, aligning with established core competencies, review rating scale criteria and salary adjustment schedules as determined by Human Resources. Human Resources will notify the Commission at least one month in advance of performance evaluation due dates. Annual salary increases will be based on the Charter Officer's performance of established objectives in the prior fiscal year. Any annual awards are made based on market considerations and according to budgetary or fiscal constraints.

#### **Commission Instructions:**

Evaluate the Charter Officer's performance for each area of accountability using the rating scale outlined below. Consider all criteria together when forming an impression about the Charter Officer's performance. Add comments you believe provide context to your rating or that would be helpful to the Charter Officer.

		Performance Descriptors and Rating Scale
5	Superior	Work performance consistently exceeds all performance expectations and displays a consistent level of exceptional performance. This is consistent, exceptional performance.
4	Exemplary	Work performance consistently achieves all performance expectations and key elements of performance consistently are carried out in an exceptional manner or sustained periods. This is consistent, outstanding performance.
3	Meets Expectations	Work performance consistently achieves all performance expectations for this factor.
2	Needs Improvement	Work performance on one or more elements is less than expected and requires some improvements to fully meet performance standards.
1	Did Not Meet Expectations	Work performance within this factor is unacceptable. Performance did not meet expected performance standards.

# Ratings 2 or below should include comments and if applicable provide specific suggestions for performance improvement.

#### **Charter Officer Instructions and Next Steps:**

- Using the above Rating Scale, the Charter Officer will self-evaluate and rate his or her performance. The Charter Officer should also attach his or her Accomplishments List or Report to the form.
- Charter Officer to submit completed self-evaluation and accomplishments report to Human Resources.
- Charter Officer to schedule individual evaluation discussion meetings with each Commission member to discuss selfevaluation and list of accomplishments. Charters should also be prepared to discuss objectives for next fiscal year.
- After reviewing the Charter Officer self-evaluation and accomplishments report with the Charter Officer, each Commission member will provide an evaluation rating, using the above Rating Scale.
- Following Commission and Charter performance evaluation discussion, completed performance evaluations are returned to Human Resources.
- Human Resources will compile and aggregate all Charter Officer evaluation ratings, coordinate and present for discussion during a publicly noticed Commission meeting. Note: Salary increases are budgeted in a personal services contingency account and recommended salary increases will be processed within established payroll processing timelines.



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### Additional Goals Sheet

how these relate to the Charter Officers' job and dep *Charter to attach Accomplishments Report for Eval Goal 2 - Describe Goal(s):	uation Peri	iod				
Commission Member: Check performance rating	1 🗆	2	3	4	5	N/A
Commission Member Comments:						
Charter Officer: Check self-evaluation rating	1	2□	3	4□	5	N/A 🗆
Charter Officer Comments:						
ioal 3 - Describe Goal(s):						
ommission Member: Check performance rating	1 🗆	2□	3□	4	-	
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narter Officer: Check self-evaluation rating	1	2	3 🗆	4	5	N/A
arter Officer Comments:						1,72



#### Introduction:

The City Commission is responsible for conducting Charter Officer annual evaluations ensuring the Charter contributes to the achievement of the City's mission, vision and goals. Charter Officer performance evaluations shall be conducted after the conclusion of each fiscal year.

The purpose of the Charter Officer evaluation is to provide timely, clear and focused input to the Charter about how well he or she is performing in the key performance areas identified as most critical by the City Commission in achieving the City of Gainesville's strategic objectives.

The Charter Officer should be evaluated using criteria established by the Commission, aligning with established core competencies, review rating scale criteria and salary adjustment schedules as determined by Human Resources. Human Resources will notify the Commission at least one month in advance of performance evaluation due dates. Annual salary increases will be based on the Charter Officer's performance of established objectives in the prior fiscal year. Any annual awards are made based on market considerations and according to budgetary or fiscal constraints.

#### **Commission Instructions:**

Evaluate the Charter Officer's performance for each area of accountability using the rating scale outlined below. Consider all criteria together when forming an impression about the Charter Officer's performance. Add comments you believe provide context to your rating or that would be helpful to the Charter Officer.

		Performance Descriptors and Rating Scale
5	Superior	Work performance consistently exceeds all performance expectations and displays a consistent level of exceptional performance. This is consistent, exceptional performance.
4	Exemplary	Work performance consistently achieves all performance expectations and key elements of performance consistently are carried out in an exceptional manner or sustained periods. This is consistent, outstanding performance.
3	Meets Expectations	Work performance consistently achieves all performance expectations for this factor.
2	Needs Improvement	Work performance on one or more elements is less than expected and requires some improvements to fully meet performance standards.
1	Did Not Meet Expectations	Work performance within this factor is unacceptable. Performance did not meet expected performance standards.

# Ratings 2 or below should include comments and if applicable provide specific suggestions for performance improvement.

#### **Charter Officer Instructions and Next Steps:**

- Using the above Rating Scale, the Charter Officer will self-evaluate and rate his or her performance. The Charter Officer should also attach his or her Accomplishments List or Report to the form.
- Charter Officer to submit completed self-evaluation and accomplishments report to Human Resources.
- Charter Officer to schedule individual evaluation discussion meetings with each Commission member to discuss selfevaluation and list of accomplishments. Charters should also be prepared to discuss objectives for next fiscal year.
- After reviewing the Charter Officer self-evaluation and accomplishments report with the Charter Officer, each Commission member will provide an evaluation rating, using the above Rating Scale.
- Following Commission and Charter performance evaluation discussion, completed performance evaluations are returned to Human Resources.
- Human Resources will compile and aggregate all Charter Officer evaluation ratings, coordinate and present for discussion during a publicly noticed Commission meeting. Note: Salary increases are budgeted in a personal services contingency account and recommended salary increases will be processed within established payroll processing timelines.



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Fiscal Year: Fy2020	Ev	aluator:	Gibi	Sir	nmon	J
Charter Officer: Ginger Bighi	e Tit	le: C	144	Andi	for	
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how these relate to the Charter Officers' job and depart	es an unu	erstanding	or organiza	uonai goai:	s and objec	tives and
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*Charter to attach Accomplishments Report for Evaluat	tion Perio	2				
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Commission Manufactor 1						N/A
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charter officer comments.						
Competencies:						
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responsibility; realizes implications of key financial in	dicators, a	nd uses eco	phomic and	industry d	ata to accu	rately
diagnose business strengths and weaknesses.		3				rucery
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Please see Charter affic vating + comments.						
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vair g						
	1□	2□		4		
Charter Officer Comments:	*□	2	3	4	5	N/A
charter Officer comments.						

HR Form 01172019, Rev2020

**Charter Officer Annual Performance Evaluation Form** Communication and Building Relationships. Communicates and listens effectively, open to receiving and giving constructive feedback, promotes frank and open discussions on issues. Cultivates a network of relationships both internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City. **Commission Member: Check competency rating** 1 2 3 40 5 N/A **Commission Member Comments:** MS. Bighie Seems to be enjaged & Communicates across the organization, not only other state but other Charters and Commissioners as well. Charter Officer: Check self-evaluation rating 10 20 3□ 40 5 N/A **Charter Officer Comments:** Fiscal Management. Prepares a balanced budget to provide services at a level directed by the Commission, 3. ensuring actions and decisions reflect an appropriate level of responsibility for financial planning and accountability. **Commission Member: Check competency rating** Plegse See charter officers self-examing Comments. 1 20 3 42 **Commission Member Comments: Charter Officer: Check self-evaluation rating** 1 20 3 40 5 **Charter Officer Comments:** 



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ommission Mombou Chock enting	~ 	1.0		40	5	N/A
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HR Form 01172019,Rev2020

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Additional Goals Sheet

*Overall Support of City Commission Goals and C City's philosophy (vision, mission, values); actively pu how these relate to the Charter Officers' job and dep *Charter to attach Accomplishments Report for Eva Goal 2 - Describe Goal(s):	ursues an ur partment.	nderstandi	ates an und ng of organ	erstanding izational go	of and sup bals and ob	ports the jectives and
Commission Member: Check performance rating						
Commission Member: Check performance rating	1 🗆	2	3	4	5	N/A
Charter Officer: Check self-evaluation rating Charter Officer Comments:	1	2	3 🗆	4	5 🗆	N/A
Goal 3 - Describe Goal(s): Commission Member: Check performance rating		*				
Commission Member Comments:	1	2	3	4	5	N/A
Charter Officer: Check self-evaluation rating	10	2	<b>2</b>			1
Charter Officer Comments:	1	2	3	4	5	N/A

5



#### Introduction:

The City Commission is responsible for conducting Charter Officer annual evaluations ensuring the Charter contributes to the achievement of the City's mission, vision and goals. Charter Officer performance evaluations shall be conducted after the conclusion of each fiscal year.

The purpose of the Charter Officer evaluation is to provide timely, clear and focused input to the Charter about how well he or she is performing in the key performance areas identified as most critical by the City Commission in achieving the City of Gainesville's strategic objectives.

The Charter Officer should be evaluated using criteria established by the Commission, aligning with established core competencies, review rating scale criteria and salary adjustment schedules as determined by Human Resources. Human Resources will notify the Commission at least one month in advance of performance evaluation due dates. Annual salary increases will be based on the Charter Officer's performance of established objectives in the prior fiscal year. Any annual awards are made based on market considerations and according to budgetary or fiscal constraints.

#### **Commission Instructions:**

Evaluate the Charter Officer's performance for each area of accountability using the rating scale outlined below. Consider all criteria together when forming an impression about the Charter Officer's performance. Add comments you believe provide context to your rating or that would be helpful to the Charter Officer.

1.11		Performance Descriptors and Rating Scale
5	Superior	Work performance consistently exceeds all performance expectations and displays a consistent level of exceptional performance. This is consistent, exceptional performance.
4	Exemplary	Work performance consistently achieves all performance expectations and key elements of performance consistently are carried out in an exceptional manner or sustained periods. This is consistent, outstanding performance.
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Ratings 2 or below should include comments and if applicable provide specific suggestions for performance improvement.

#### **Charter Officer Instructions and Next Steps:**

- Using the above Rating Scale, the Charter Officer will self-evaluate and rate his or her performance. The Charter Officer should also attach his or her Accomplishments List or Report to the form.
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- Human Resources will compile and aggregate all Charter Officer evaluation ratings, coordinate and present for discussion during a publicly noticed Commission meeting. Note: Salary increases are budgeted in a personal services contingency account and recommended salary increases will be processed within established payroll processing timelines.



Fiscal Year: FY2020	Evaluator: Ward
Charter Officer: Ginger Bigbie	Title: City Auditor

Goal(s) If needed use additional goals sheet (page 5):

\*Overall Support of City Commission Goals and Objectives. Demonstrates an understanding of and supports the City's philosophy (vision, mission, values); actively pursues an understanding of organizational goals and objectives and how these relate to the Charter Officers' job and department.

\*Charter to attach Accomplishments Report for Evaluation Period

#### Describe Goal(s):

Not only does the City Auditor's Office support the City's goals and objectives through the enterprise risk assessment and audit plan process, we identify instances in an audit engagement where management processes may not align with the City's goals and objectives.

New City Auditor goals as reviewed with Commissioners:

#### Goal 1:

Rebuild and develop a collaborative and skilled **Internal Audit Team** in Year One (by February 24, 2021) that provides City-wide internal audit coverage of the highest risks impacting the City of Gainesville. Develop, implement and monitor departmental goals and objectives that are aligned with the strategic direction and business plan of the City Commission and professional standards for the professional practice of internal auditing in the public sector.

#### Goal 2:

Develop an **agile and risk-based internal audit plan** that supports City Commission strategic objectives; provide annual training to the City Commission on internal audit and risk assessment processes; provide ongoing training for City Auditor staff.

#### Goal 3:

Develop and enhance internal audit and investigative **processes** through risk-based, value-add internal audit, advisory and investigative services and capabilities. Enhance real-time, agile advisory services capabilities to address emerging risks and support management requests for audits and special projects that support risk mitigation efforts and help verify the sufficiency, accuracy, and reliability of information provided to the City Commission by City management.

#### Goal 4:

Develop and implement an effective **audit issue follow up program** that identifies responsible parties, reasonable due dates, and management accountability for remediation plans, as well as Internal Audit escalation of past due issues to the City Commission. The first year program includes two parts: 1) evaluation and management of aged open audit issues; 2) improved development of future audit issues by focusing on audit issue root causes, prioritization based on assessed level of risk, and realistic management action plans to improve effectiveness and efficiency of operations and mitigate identified risk.

Commission Member: Check performance rating	1 🗌	2	3 🗆	4	5	N/A

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# **Charter Officer Annual Performance Evaluation Form**

Annual Performance	rmance	Lvaiu	апоп г			
Commission Member Comments:						
Charter Officer: Check self-evaluation rating	1	2□	3□	4	5⊠	N/AC
Charter Officer Comments: Please see attached "Activities and Accomplishment	ts" for docur	nentation o	f the City A	uditor's 4 g	oals.	
ompetencies:						
<ul> <li>Business Acumen. Understands the business, fi responsibility; realizes implications of key finance diagnose business strengths and weaknesses.</li> </ul>	inancial stati ial indicator	us of the or s, and uses	ganization a economic a	ind core op ind industry	erational a / data to ac	rea of curately
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#### Charter Officer Comments:

While overcoming pre-conceived notions of what internal audit does, my team and I continue to strengthen relationships across the City by treating all with respect and courtesy. While recognizing management expertise, we demonstrate one project at a time the value this office brings to the table by recognizing management subject matter expertise and gaining consensus on audit issues and best risk mitigation activities with limited resources.

3. Fiscal Management. Prepares a balanced budget to provide services at a level directed by the Commission, ensuring actions and decisions reflect an appropriate level of responsibility for financial planning and accountability.

Commission Member: Check competency rating	1	2	3 🗆	4	5BK	N/A
Commission Member Comments:						

Charter Officer Comments:

We have little financial activity and have been under budget due to vacant positions. When fully staffed we have a tight budget with very little room to hire external subjet matter experts. We ensure current staff have adequate knowledge and training to perform the City's internal audits over all areas of highest risk exposure.



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# **Charter Officer Annual Performance Evaluation Form**

Commission Member: Check competency rating	10	2	3	4	5DP	N/AC
Commission Member Comments:						
Charter Officer: Check self-evaluation rating	1	2	3 🗆	4	5⊠	N/A
Demonstrating the highest ethical standards, policy co function. We manage the fraud hotline and ensure Ci	ity staff and	neighbors o	can have co	onfidence ir	the proce	iss.
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*Office of the City Auditor* 

City of Gainesville, Florida

# **Report to the City Commission**

# 2020 Activities and Accomplishments -Office of the City Auditor-

November 2020

Ginger Bigbie, CPA, CFE, City Auditor 200 E University Avenue, Room 211 Gainesville, FL 32601



#### GAINESVILLE CITY COMMISSION

Lauren Poe, Mayor \* David Arreola, Mayor-Commissioner Pro Tem \* Adrian Hayes-Santos Gail Johnson Reina Saco Gigi Simmons Harvey Ward

\*Audit & Finance Committee Member

 To:
 Honorable Mayor and City Commissioners

 Fr:
 Ginger Bigbie, City Auditor

Subject: 2020 Activities and Accomplishments of the Office of the City Auditor

### INTRODUCTION

The City Auditor's Office is an independent internal audit function, reporting directly to the City Commission, while the Audit and Finance Committee consisting of the Mayor and Mayor Pro-Tem provides oversight of activities.

Our mission is to become an increasingly agile internal audit team while promoting honest, efficient, effective, transparent and fully accountable government. To carry out this mission we perform risk-based audits, advisory services, special projects, and management requests. In addition, we manage the City's Fraud, Waste and Abuse Hotline and conduct investigations.

### **ACTIVITIES AND ACCOMPLISHMENTS**

The four goals below for the City Auditor's Office were reviewed with City Commissioners. Activities and accomplishments are provided below each goal.

### Goal 1:

Rebuild and develop a collaborative and skilled **Internal Audit Team** in Year One (by February 24, 2021) that provides City-wide internal audit coverage of the highest risks impacting the City of Gainesville. Develop, implement and monitor departmental goals and objectives that are aligned with the strategic direction and business plan of the City Commission and professional standards for the professional practice of internal auditing in the public sector.

### **Activities and Accomplishments**

- Staffing: Our office is now fully staffed with the exception of an Executive Assistant position
  that we expect to fill in the coming weeks. Our team consist of the City Auditor, four fulltime professional auditors, and one temporary part-time professional auditor who will retire
  in December 2020. This position is expected to be posted and filled by the end of February
  2021. We have established stronger IT internal auditing capabilities and have created
  "integrated auditing" processes and procedures so every audit and project can benefit from
  the various skills and strengths of staff across the department and provide better coverage
  of risk exposures in performing our engagements.
- Policy/Procedures/Guidelines: Internal policy, procedures and guidelines have been updated this year to reflect revised professional standards (Generally Accepted Government Auditing Standards; Institute of Internal Auditor's Professional Practices Framework), IT auditing standards, and investigation professional standards. We established an internal data management policy and best practices to ensure internal audit staff understand data privacy and security risks and take appropriate steps to protect the City's high-risk data that we handle.
- Internal Audit staff complete a minimum of 40 continuing professional education hours annually to comply with professional standards and to maintain various professional certifications including Certified Public Accountant, Certified Internal Auditor, Certified Government Auditing Professional, Certified Information Systems Auditor, and Certified Fraud Examiner. Staff have completed training in ethics, government auditing, audit project management, grants management, information technology, cybersecurity, and fraud prevention and detection, among other topics.

### Goal 2:

Develop an **agile and risk-based internal audit plan** that supports City Commission strategic objectives; provide annual training to the City Commission on internal audit and risk assessment processes; provide ongoing training for City Auditor staff.

### **Activities and Accomplishments**

We introduced the City's first Internal Audit **enterprise risk assessment** that is designed to inform a risk-based audit plan and revised periodically based on top priorities and emerging risks. Results will be reported this year in the City Auditor's Office annual report and risk assessment on December 8, 2020.

We completed the following **engagements** this year, resulting in gained efficiencies and reduced risks once management remediation efforts are complete:

- Affirmative Action Plan (5 opportunities for improvement)
- Audit Phase II of the General Government Enterprise Resource Planning System Implementation
- Cybersecurity Audit (issues are confidential (4 opportunities for improvement)

- Audit of Internal Controls and Data Security for the use of Driver's License and Motor Vehicle Record Data Exchange (7 improvements related to data security controls were recommended)
- 2020 Follow-Up Status Report\_FY2019 (listing of all open audit issues, one dating back to 2014)
- Reichert House Inc-AUP report (agreed upon procedures no recommendations)
- Palm Breeze Youth Services Inc-AUP report (agreed upon procedures no recommendations)
- Advisory Phase III -General Government Enterprise Resource Planning System (3 opportunities for improvement related to systems testing and information security)
- Advisory Cybersecurity Readiness Review (security related issues are confidential)
- Management request Temporary Employee Services Invoicing-Targeted Review (4 considerations)
- Audit Report\_General Government Non-pension Investments (3 opportunities for improvement)

We provided the first **annual training for City Commissioners** to assist with better understanding of the City's key risks and the City's ability to manage them. The result of annual and ongoing citywide risk assessment conversations is to identify and prioritize audits, consultations, and special projects. that offer the most value to the City and adding them to the audit plan. The City Auditor may reprioritize engagements on the audit plan due to emerging risks. As engagements are completed during the year, new engagements from the priorized list are added. The prioritized list is refreshed from time to time through enterprise risk assessment conversations with City leaders and managers.

### Goal 3:

Develop and enhance internal audit and investigative **processes** through risk-based, value-add internal audit, advisory and investigative services and capabilities. Enhance real-time, agile advisory services capabilities to address emerging risks and support management requests for audits and special projects that support risk mitigation efforts and help verify the sufficiency, accuracy, and reliability of information provided to the City Commission by City management.

### **Activities and Accomplishments**

Our office introduced the first **Quarterly City Auditor Update** for the City Commission that provides more current and transparent updates on Internal Audit activities. In addition, we introduced **Periodic Monitoring** that is a process for internal auditors to monitor elevated risk exposures while management develops and implements new programs around higher risk processes. Examples include following up with management to understand how key risks are being addressed, and to provide credible challenge where appropriate for topics such as ERP system implementation and Enterprise IT Governance. Periodic Monitoring risk levels are reported in the City Auditor Quarterly Updates.

Our completed special projects this year include:

- City Commission request Credible Challenge of Management's Proposed October 1, 2020 Pension Obligation Bond Financing Plan as presented in, "City of Gainesville Retirement Plans-Pension Obligation Bond Analysis –PFM".
- GG Financial Reporting Process –Special project validating management's implementation of stronger controls around monthly, quarterly and year-end financial reporting. Memo to be issued at the Dec. 8, 2020 Audit & Finance Committee meeting.
- GNV Cares discussions with management for independent selection of awards (not needed due to low number of applicants)
- Affordable Housing Randomization Tool for Heartwood Subdivision Internal Audit process for independent and automated random selection of applicants to receive housing awards.

The City Auditor's Office recently adapted an Internal Audit Equity Toolkit from the Seattle City Auditor's Office. This toolkit facilitates equity considerations during each audit engagement planning phase. When opportunities for improvement in equitable outcomes for staff or neighbors are present, additional test steps are written into the audit program for the engagement to ensure coverage of the risk.

External Audits: The City Auditor's Office facilitates selection of the external auditor and pricing terms. In addition, our office serves as the City's liaison for the **Auditor General operational audit** of the City of Gainesville that kicked off in March 2020. We provide regular updates to management and ensure communications are running smoothly. The audit is expected to wrap in the coming weeks.

The City Auditor's Office now participates in the **New Employee Orientation** program and is working with HR to develop a brief ethics, compliance and fraud awareness training for all City staff.

#### Goal 4:

Develop and implement an effective **audit issue follow up program** that identifies responsible parties, reasonable due dates, and management accountability for remediation plans, as well as Internal Audit escalation of past due issues to the City Commission. The first year program includes two parts: 1) evaluation and management of aged open audit issues; 2) improved development of future audit issues by focusing on audit issue root causes, prioritization based on assessed level of risk, and realistic management action plans to improve effectiveness and efficiency of operations and mitigate identified risk.

#### **Activities and Accomplishments**

This year we re-designed and implemented an **audit issue follow up program** that requires most audit issues to be remediated by management within one year or less of the audit report publication. The program required re-evaluation of all aged open audit issues and required the addition of new due dates and responsible parties. The program also focuses on aggregating findings during an audit based on root causes and risk ratings, resulting in fewer but more impactful recommendations. 16 audit issues have been **fully remediated** and closed in 2020, resulting in **improved controls** around accounts payable processes, GRU non-pension investments, EO mandatory diversity training, Internal Controls and Data Security for the Use of Driver's License and Motor Vehicle Record Data Exchange, and payroll system.

### CONCLUSION

I would like to thank the Mayor, City Commissioners and staff for their support of the City Auditor's Office and continued efforts to improve City operations and services. I would also like to thank the City Auditor's Office staff for their hard work and dedication that make the City Auditor's Office accomplishments possible.

# FELDMAN



### Introduction:

The City Commission is responsible for conducting Charter Officer annual evaluations ensuring the Charter contributes to the achievement of the City's mission, vision and goals. Charter Officer performance evaluations shall be conducted after the conclusion of each fiscal year.

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### **Commission Instructions:**

Evaluate the Charter Officer's performance for each area of accountability using the rating scale outlined below. Consider all criteria together when forming an impression about the Charter Officer's performance. Add comments you believe provide context to your rating or that would be helpful to the Charter Officer.

1.1		Performance Descriptors and Rating Scale
5	Superior	Work performance consistently exceeds all performance expectations and displays a consistent level of exceptional performance. This is consistent, exceptional performance.
4	Exemplary	Work performance consistently achieves all performance expectations and key elements of performance consistently are carried out in an exceptional manner or sustained periods. This is consistent, outstanding performance.
3	Meets Expectations	Work performance consistently achieves all performance expectations for this factor.
2	Needs Improvement	Work performance on one or more elements is less than expected and requires some improvements to fully meet performance standards.
1	Did Not Meet Expectations	Work performance within this factor is unacceptable. Performance did not meet expected performance standards.

# Ratings 2 or below should include comments and if applicable provide specific suggestions for performance improvement.

### **Charter Officer Instructions and Next Steps:**

- Using the above Rating Scale, the Charter Officer will self-evaluate and rate his or her performance. The Charter Officer should also attach his or her Accomplishments List or Report to the form.
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- Following Commission and Charter performance evaluation discussion, completed performance evaluations are returned to Human Resources.
- Human Resources will compile and aggregate all Charter Officer evaluation ratings, coordinate and present for discussion during a publicly noticed Commission meeting. Note: Salary increases are budgeted in a personal services contingency account and recommended salary increases will be processed within established payroll processing timelines.



Charter Officer: L. Foldma			1/10	Arreol	1	
	T	itle: ()	N			
Goal(s) If needed use additional goals she		-60				
*Overall Support of City Commission Goals and City's philosophy (vision, mission, values); actively how these relate to the Charter Officers' job and d *Charter to attach Accomplishments Report for E Describe Goal(s):	pursues an ur lepartment. valuation Per	iderstandir	ng of organ			
Commission Member: Check performance rating	1 🗆	2□	3 🗆	40	5	N/A
Organized and results						
Charter Officer: Check self-evaluation rating	1	2	3	4	5	N/A
ompetencies: Business Acumen. Understands the business, f						
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3

# **Charter Officer Annual Performance Evaluation Form**

the City. Commission Member: C	heck competency rating	1 1 D	A 20	3 🗆	4	5	N/A
Commission Member Co	mments: ComuniccAin	lacks	and	tros	, pa	Ken	vi
down.	9 - 4 - 4 - <sup>4</sup> - <sup>4</sup>		4 H.		Э		
Charter Officer: Check se		10	2	3	4	5	N/A
	•••••••	14.7					
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4. Integrity. Demonstrates the highest level of integrity and ethical behavior, adhering to the City's code of conduct upholding the values of the City, challenges questionable work standards and confronts or reports suspicious practices to appropriate leaders or authorities.

Commission Member: Check competency rating	10	2	3□	4	5	N/A
OFFICE VIOLAED Federa	1 100	part	coting	ern	phyers	
OFFICE Violeted Federa From retalistory action.	Presig	natin	has	bur	(cun.	estal.
Charter Officer: Check self-evaluation rating	1	2	3 🗆	4	5	N/A□
Charter Officer Comments:						
Charter Officer Comments:						

ommission Member: Check rating	1	2	3	4	5	N/A
ommission Member Comments: Invotigation 1173 aforer Unaccepteble Conduct In	newfron ed	ſø	And	ien re	weed s	4 - 1.
unacceptuble conduct in	official	Copie	Ay.	5	X	
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harter Officer Comments:		ii).				
				_		
arter Officer Signature:			Date:			
arter Officer Signature:	ante		-	12/14	1202	

HR Form 01172019,Rev2020



Additional Goals Sheet

	N	S		and the		
*Overall Support of City Commission Goals and C	Dijectives.	Jemonstra	tes an und	erstanding	of and sup	ports the
City's philosophy (vision, mission, values); actively pu how these relate to the Charter Officers' job and dep	irsues an un	derstandin	g of organi	zational go	als and obj	ectives and
*Charter to attach Accomplishments Report for Eval		od				
Goal 2 - Describe Goal(s):						
Commission Member: Check performance rating	1 🗆	2	3	4	5	N/A
Commission Member Comments:						
Charter Officer: Check self-evaluation rating	1	2	3□	4	5	N/A
Charter Officer Comments:						II/AL
						1
Goal 3 - Describe Goal(s):						
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<u>Goal 3 - Describe Goal(s):</u>						
<u>Goal 3 - Describe Goal(s):</u>						
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Commission Member: Check performance rating	1	2□	3	4	5	N/A□
Commission Member: Check performance rating	1	2	3	4	5	N/A 🗆
Commission Member: Check performance rating	1	2	3	4	5	N/A
Commission Member: Check performance rating	1	2	3	4	5	N/A 🗆
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<b>Commission Member: Check performance rating</b> Commission Member Comments:						N/A
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### Gainesville. Citizen centered People empowered

### Charter Officer Annual Performance Evaluation Form

### Introduction:

The City Commission is responsible for conducting Charter Officer annual evaluations ensuring the Charter contributes to the achievement of the City's mission, vision and goals. Charter Officer performance evaluations shall be conducted after the conclusion of each fiscal year.

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### **Commission Instructions:**

Evaluate the Charter Officer's performance for each area of accountability using the rating scale outlined below. Consider all criteria together when forming an impression about the Charter Officer's performance. Add comments you believe provide context to your rating or that would be helpful to the Charter Officer.

		Performance Descriptors and Rating Scale
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- Human Resources will compile and aggregate all Charter Officer evaluation ratings, coordinate and present for discussion during a publicly noticed Commission meeting. Note: Salary increases are budgeted in a personal services contingency account and recommended salary increases will be processed within established payroll processing timelines.

Fiscal Year: 2020	Evaluator: Adrian Hayes-Santos
Charter Officer: Lee Feldman	Title: City Manager
Goal(s):	·
*Overall Support of City Commission Goals and Objecti City's philosophy (vision, mission, values); actively pursues a how these relate to the Charter Officers' job and departmen *Charter to attach Accomplishments Report for Evaluation Describe Goal(s): Discussed in meeting	n understanding of organizational goals and objectives and it.
beschibe douloy. Discussed in meeting	
Commission Member: Circle performance rating 1	□ 2□ 3□ 4□ 5⊠ N/A□
Commission Member Comments:	
Charter Officer: Circle self-evaluation rating 1	2 2 3 4 5 N/A
Charter Officer Comments:	
Competencies:	
<ol> <li>Business Acumen. Understands the business, financial responsibility; realizes implications of key financial indic diagnose business strengths and weaknesses.</li> </ol>	status of the organization and core operational area of ators, and uses economic and industry data to accurately
Commission Member: Check competency rating 1	] 2□ 3□ 4□ 5⊠ N/A□
Commission Member Comments:	
Charter Officer: Check self-evaluation rating 1	2 2 3 4 5 N/A
Charter Officer Comments:	

### Gainesville. Citizen centered People empowered

# **Charter Officer Annual Performance Evaluation Form**

2. Communication and Building Relationships. Com constructive feedback, promotes frank and open dis internal and external, promotes collaboration and re the City.	scussions o	n issues. Cu	ltivates a n	etwork of r	elationship	s both
Commission Member: Check competency rating	1□	2□	3⊠	4	5 🗆	N/A🗆
Commission Member Comments:						
Charter Officer: Check self-evaluation rating	1□	2□	3□	4□	5 🗆	N/A□
Charter Officer Comments:						

3. Fiscal Management. Prepares a balanced budget t ensuring actions and decisions reflect an appropria	•			•		-
Commission Member: Check competency rating	1□	2□	3□	4⊠	5 🗆	N/A□
Commission Member Comments:						
Charter Officer: Check self-evaluation rating	1	2□	3🗆	4	5 🗆	N/A□
Charter Officer Comments:						

4. Integrity. Demonstrates the highest level of inte				-	-	
upholding the values of the City, challenges ques	tionable wo	rk standard	s and conf	ronts or rej	ports suspic	ious
practices to appropriate leaders or authorities.						
Commission Member: Check competency rating	1□	2□	3□	4⊠	5□	N/A□
Commission Member Comments:		1				
Charter Officer: Check self-evaluation rating	1□	2□	3□	4□	5 🗆	N/A□
Charter Officer Comments:						
5. Leading and Supervision. Effectively establishes	s strategies <sup>+</sup>	to develop a	and maxim	ize employ	ee perform	ance, fost
high standards in meeting the vision, mission and	-	-		1 /		,
Commission Member: Check rating	1□	2□	3□	4⊠	5 🗆	N/A□
Commission Member Comments:						
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	1	2□	3□	4	5□	N/A
	1	2□	3	4	5□	N/A
	1	2	3	4	5	N/A
	1	2	3	4	5	N/A
	1	2	3	4	5	N/A
	1	2	3	4	5	N/A⊑
	1	2	3	4	5	N/A
	1	2	3	4	5	N/A□
Charter Officer: Check self-evaluation rating Charter Officer Comments: harter Officer Signature:					5	
Charter Officer Comments:			Date:			

Gainesville.

Citizen centered People empowered



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1242		Performance Descriptors and Rating Scale
5	Superior	Work performance consistently exceeds all performance expectations and displays a consistent level of exceptional performance. This is consistent, exceptional performance.
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FY20						
Charter Officer:	Т	itle:				
Goal(s) If needed use additional goals sheet						
*Overall Support of City Commission Goals and City's philosophy (vision, mission, values); actively p how these relate to the Charter Officers' job and de *Charter to attach Accomplishments Report for Eva Describe Goal(s):	ursues an ur partment.	derstandin				
Commission Member: Check performance rating Commission Member Comments:	1 🗆	2	3	4	5	N/A
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responsibility; realizes implications of key financi diagnose business strengths and weaknesses. Commission Member: Check competency rating	nancial statu	s of the org	anization a	ind core op	erational ar	ea of
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Charter Officer Comments: Competencies: Business Acumen. Understands the business, fir responsibility; realizes implications of key financi diagnose business strengths and weaknesses. Commission Member: Check competency rating	nancial statu al indicators	s of the org , and uses o	anization a	ind core op ind industry	erational ar	ea of curately



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Commission Member Comments:						
Charter Officer: Check self-evaluation rating Charter Officer Comments:	1	2	3□	4	5	N/A
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ensuring actions and decisions reflect an approp Commission Member: Check competency rating	et to provide riate level of 10	services at responsibi 20	a level dire lity for final 30	cted by the ncial planni	e Commissi ng and acc 5	on <i>;</i> ountability <b>N/A</b> □
ensuring actions and decisions reflect an approp Commission Member: Check competency rating	riate level of	responsibi	lity for final	ncial planni	ng and acc	ountability.
<ol> <li>Fiscal Management. Prepares a balanced budge ensuring actions and decisions reflect an approp</li> <li>Commission Member: Check competency rating</li> <li>Commission Member Comments:</li> <li>Charter Officer: Check self-evaluation rating</li> <li>Charter Officer Comments:</li> </ol>	riate level of	responsibi	lity for final	ncial planni	ng and acc	ountability.

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Commission Member: Check competency rating Commission Member Comments:	12	2	3	4	5	N/A
commission member comments.						
Charter Officer: Check self-evaluation rating	1	2	3	4	5	N/A
. Leading and Supervision. Effectively establishes	s strategies	to develop	and maxim	ize employ	ee perform	nance, foste
high standards in meeting the vision, mission and Commission Member: Check rating	s strategies I goals of th	to dévelop a e departme 2 🗆	and maxim nt.	ize employ	ee perform	nance, foste
high standards in meeting the vision, mission and Commission Member: Check rating	l goals of th	e departme	nt.	/		
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high standards in meeting the vision, mission and Commission Member: Check rating Commission Member Comments: Charter Officer: Check self-evaluation rating	l goals of th	e departme	nt,	4	5	N/A

HR Form 01172019, Rev2020

### **Commissioner Johnson Charter Officers Evaluation**

12/23/20

FY 20

This has been a challenging year. I appreciate the work of our charter officers to keep the city running. You all have adapted, pivoted when needed, and put the safety of our community builders and neighbors first. You all have done this through stressful events, sometimes with children at home and a host of other responsibilities. You have done this while keeping the goals of a very ambitious and very engaged commission at the forefront. This is not to be taken lightly, and in this regard, you all are s/heroes. Doing an evaluation during the best of times is challenging. In the middle of a global pandemic, it is more than challenging, to say the least. My personal challenge has been distinguishing between what is "normal" during this time, because there is no normal; and balancing my expectations from the beginning of the year until now. With the understanding that there are grey areas, nuance and involve over 2200 community builders that support your work, I offer some of my thoughts.

**Ed Bielarski** has done an effective job as the General Manager. He is knowledgeable in all aspects of the utility and does a good job building and motivating his team of over 1000 employees. Ed has an ability to consistently tell the Commission not what it wants to hear, but what it needs to hear. I believe that this leads to better decision making and a better understanding of the impacts of our decision on the utility. Mr. Bielarski is a big supporter of his team, it is my hope that this support does not lead to blind spots and/or disparate outcomes in the treatment of some employees.

As the newest member of the team, **Ginger Bigbie** has made admirable and quick work of staffing her office. During the time Auditor Bigbie has been with the city, there has been significant progress made on goals. There is also a clear path forward for the function of this office and a very clear willingness and ability to integrate the function of this office with the goals of the commission. I appreciate the non-linear thinking and ways to problem solve that have been exhibited by Ginger Bigbie.

Lee Feldman has done a fantastic job with the strategic action plan for the commission/organization and aligning it with specific projects and outcomes. The issuance of the new 2020 Pension Obligation Funds was an astute decision. Many other decisions made by the city manager are clearly rooted in decades of experience, experience that serves this city well. This experience is also why I am concerned about the level of professionalism the city manager has exhibited (as indicated in recent reports), when leading and working with community builders and charter officers. It is my expectation that a shift will occur in his leadership style, communication, and level of transparency. It is also my hope and expectation that the city manager will actively address cultural problems that have been exacerbated by recent events.

**Omichelle Gainey** has been reliable, consistent and highly effective in managing the roles and duties of her office. She has hired an amazing team that is also highly effective in their jobs. I appreciate the work that her office does that directly impacts the success of the commission, most notably, the policy research team. Clerk Gainey is always looking for ways to improve processes. In 2021, I look forward to progress that will be made as it relates to the board and committees. With an improved process and partnerships, I believe that we can have boards and committees that are reflective of our community.

Teneeshia Marshall has done a great job with the core functions of the Office of Equal Opportunity. Her strengths and abilities are in compliance, investigation and monitoring. As the transition from the Office of Equal Opportunity to the Office of Equity and Inclusion happens, with more responsibilities and an enhanced mission, I look forward to the following; a laser sharp focus on building out effective core equity teams throughout all of general government; a concerted effort to build a functioning racial equity task force; a useful racial equity toolkit and a process about when, where, how and by whom it should be used; and staff to be able to execute the goals as agreed upon by the commission. I believe that with consistent communication, imagination and working collaboratively with charter officers on the goals, we will get to a place we can all be proud of.

---Through difficult to navigate situations, Mrs. Marshall has been professional and acted with integrity. Her prior experience in investigations as well as her character have served the city well.

**Nicolle Shalley** is highly ethical and able to provide a balanced view of issues. Although I have never fully understood the boundaries of what is permissible to expect from her office, she seems to do a good job at delegating and balancing the many issues that have a legal component. Providing updates to the commission on where projects are in the pipeline with her office has been helpful. I look forward to the following in 2021; processes put in place for stated goals to happen more expeditiously and/or an established timeline for high priority goals and ordinances; better communication and general assistance for simplistic questions and/or tasks.

As we continue the ambitious work of the city and commission in 2021, I hope that as a team, the charter officers will all assist in Goal 1 of the strategic plan- an equitable community. This aligns with a city racial equity policy and plan. I see this as a function of all of our charter officers working collaboratively and most importantly, a partnership between the office of equity and inclusion and the city manager's office. My hope for this city is a functioning, healthy city as measured by social determinants and a willingness to address poverty in our city. The opportunity gaps are growing with each day that passes, and I believe that the biggest challenges that lie ahead will be the negative outcomes associated with housing, health, education and our food system.

Thank you for all that you all do. None of it is easy, but I appreciate that you all keep on showing up. All of you have the hearts of public servants and want the best for Gainesville.

Sincerely,

**Commissioner Johnson** 



### Introduction:

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- After reviewing the Charter Officer self-evaluation and accomplishments report with the Charter Officer, each Commission member will provide an evaluation rating, using the above Rating Scale.
- Following Commission and Charter performance evaluation discussion, completed performance evaluations are returned to Human Resources.
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Fiscal Year: 200	Evaluator: POE
Charter Officer: City Manager	Title: Mayer
Goal(s) If needed use additional goals sheet (page "Overall Support of City Commission Goals and Object City's philosophy (vision, mission, values); actively pursues how these relate to the Charter Officers' job and departme "Charter to attach Accomplishments Report for Evaluation Describe Goal(s): 1. Equitable Comment. A 2. Sustainable Comment. 3. Great Place to Live & Experiments 4. Nogicl: ent Local Economy 5. Best In Class Neighbor (Sommission Member: Check performance rating) Commission Member: Comments:	e 5): tives. Demonstrates an understanding of and supports the an understanding of organizational goals and objectives and ent. In Period Ly concerne Ly co
the City Counts Star's ad any chanter officer 1 b that he is responsed by for Counties Sich's Vision and b Charter Officer: Check self-evaluation rating 1 Charter Officer Comments:	lepted Stralegic plan them here wated with the consists implementing the news to experience to do So. 20 30 40 50 N/AD
Competencies: 1. Business Acumen. Understands the business, financial responsibility; realizes implications of key financial indi- diagnose business strengths and weaknesses.	cators, and uses economic and industry data to accurately .
Commission Member: Check competency rating	그는 것 같은 것 같
Commission Member Comments: The CM is highly adep complex: Hirs of the city already made significa saved money created of mareased ain reserve	t at undustanding the is budget. He have at changes that have eater efficiency, and
Charter Officer: Check self-evaluation rating 1[	2 2 3 4 5 N/A
Charter Officer Comments:	
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Channual Perform	arter O mance		ation F	orm		
2. Communication and Building Relationships. Co constructive feedback, promotes frank and open internal and external, promotes collaboration and the City.	discussions	on lesuor	Cultivator	a hatural	at the second	
Commission Member: Check competency rating	1	2	314	4	5	N/A
Commission Member Comments: The CM needs some m While I do see the CM Staff, he closes lack a of Staff, he closes lack a of Staff, he closes lack a of Lee that he has water Charter Officer: Check self-evaluation rating	npeon bein lipla	vene nafi impr	ut in y cl da fine	ech n Hui	ast with ast	times.
Charter Officer: Check self-evaluation rating	1	2	30	4	5	N/A
3. Fiscal Management. Prepares a balanced budget ensuring actions and decisions reflect an appropria	ate level of r	esnonsihi	ity for fina	ncial niann	ing and ac	ion, countability.
Commission Member: Check competency rating	1	2	3	4	52	N/A
Commission Member Comments: The CM is highly and of the again zation - Strengths.	pable	et PC	l'sé	cal 1		
Charter Officer: Check self-evaluation rating	10	2	3□	4	5	N/A
Charter Officer Comments:						

<b>Annual Per</b>	Charter Off formance Ev		form	2
4. Integrity. Demonstrates the highest level o upholding the values of the City, challenges practices to appropriate leaders or authoriti Commission Member: Check competency rating Commission Member Comments: J believe the CM I high studend B in his pail with some w an any goals, and he	questionable work les. g 1	tandards and cor 2□ 3□	ifronts or report	rts suspicious
on any goals, and he,	I we wins	- do mai	2 to che	inge those
Charter Officer: Check self-evaluation rating Charter Officer Comments:		2 3	4	5 N/A
5. Leading and Supervision. Effectively establi high standards in meeting the vision, mission	ishes strategies to d and goals of the de	evelop and maxim partment.	ize employee r	performance, foster
Commission Member: Check rating	10	2 3	And I	5□ N/A□
Commission Member Comments: The CM has lice ag how to advance palicies, the needs- one leaders hip too mule responsibility	ellent Vis The can to Centri un and	ich cen und ssi were to f	dan u cris eu llout clelej	inclusterelie clapted hès abo
Charter Officer: Check self-evaluation rating Charter Officer Comments:	1 2	□ 3□	4	5 N/A
narter Officer Signature:	R	Date: Date:(	2/18/20	ð
Return fully completed Charter Officer	Performance Evaluatior	form to Human Reso		x 20 HR Form 01172019,Rev2020



Additional Goals Sheet

*Overall Support of City Commission Goals and C City's philosophy (vision, mission, values); actively pu how these relate to the Charter Officers' job and dep *Charter to attach Accomplishments Report for Eval Goal 2 - Describe Goal(s):	rsues an u artment.	nderstandir	ng of organia	rstanding ational go	of and supp als and obj	oorts the ectives and
See (5) goals from. She tegic Plan	the	Cern	m's	stan	ح هد	sep kd
Commission Member: Check performance rating	1	2	3	4	5	N/A
Commission Member Comments:						- Mines
<				,		
<b>`</b>	1 <sub>.06</sub>	:	•	9	,	
Charter Officer: Check self-evaluation rating	1	2	3□	4	5	N/A
Charter Officer Comments: <u>Goal 3 - Describe Goal(s):</u>						r
Commission Member: Check performance rating Commission Member Comments:		2	3	4	5	N/A
Charter Officer: Check self-evaluation rating	10	2	3 🗌	4	5	N/A
Charter Officer Comments:					- <u>-</u>	



### Introduction:

The City Commission is responsible for conducting Charter Officer annual evaluations ensuring the Charter contributes to the achievement of the City's mission, vision and goals. Charter Officer performance evaluations shall be conducted after the conclusion of each fiscal year.

The purpose of the Charter Officer evaluation is to provide timely, clear and focused input to the Charter about how well he or she is performing in the key performance areas identified as most critical by the City Commission in achieving the City of Gainesville's strategic objectives.

The Charter Officer should be evaluated using criteria established by the Commission, aligning with established core competencies, review rating scale criteria and salary adjustment schedules as determined by Human Resources. Human Resources will notify the Commission at least one month in advance of performance evaluation due dates. Annual salary increases will be based on the Charter Officer's performance of established objectives in the prior fiscal year. Any annual awards are made based on market considerations and according to budgetary or fiscal constraints.

### **Commission Instructions:**

Evaluate the Charter Officer's performance for each area of accountability using the rating scale outlined below. Consider all criteria together when forming an impression about the Charter Officer's performance. Add comments you believe provide context to your rating or that would be helpful to the Charter Officer.

		Performance Descriptors and Rating Scale
5	Superior	Work performance consistently exceeds all performance expectations and displays a consistent level of exceptional performance. This is consistent, exceptional performance.
4	Exemplary	Work performance consistently achieves all performance expectations and key elements of performance consistently are carried out in an exceptional manner or sustained periods. This is consistent, outstanding performance.
3	Meets Expectations	Work performance consistently achieves all performance expectations for this factor.
2	Needs Improvement	Work performance on one or more elements is less than expected and requires some improvements to fully meet performance standards.
1	Did Not Meet Expectations	Work performance within this factor is unacceptable. Performance did not meet expected performance standards.

# Ratings 2 or below should include comments and if applicable provide specific suggestions for performance improvement.

### **Charter Officer Instructions and Next Steps:**

- Using the above Rating Scale, the Charter Officer will self-evaluate and rate his or her performance. The Charter Officer should also attach his or her Accomplishments List or Report to the form.
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			: Commi	ssioner f	keina Sac	20
Charter Officer: Lee Feldman	Т	itle: Cit	y Manag	er		
Goal(s) If needed use additional goals sheet		3				
*Overall Support of City Commission Goals and City's philosophy (vision, mission, values); actively pu how these relate to the Charter Officers' job and dep *Charter to attach Accomplishments Report for Eva Describe Goal(s):	ursues an ur partment.	nderstandir	ites an und ng of organi	erstanding zational go	of and supp als and obj	ports the ectives and
Commission Member: Check performance rating	1 🗆	2□	3	4	5	
Commission Member: Comments:			3	4	SKL	N/A
Charter Officer: Check self-evaluation rating Charter Officer Comments:	1	2	3	4	5	N/A□
<ol> <li>Business Acumen. Understands the business, fin responsibility; realizes implications of key financia diagnose business strengths and weaknesses.</li> </ol>	al indicators	s of the org , and uses	anization a economic a	ind core op nd industry	erational ar v data to acc	ea of ' curately
<ol> <li>Business Acumen. Understands the business, fin responsibility; realizes implications of key financia diagnose business strengths and weaknesses.</li> <li>Commission Member: Check competency rating</li> </ol>	iancial statu al indicators	s of the org , and uses	anization a economic a	nd core op nd industry	erational ar data to acc	rea of ' curately
responsibility; realizes implications of key financia	al indicators	, and uses	economic a	nd industry	data to aci	curately



<b>Commission Member: Check competency rating</b>	10	2	3	45	5	N/AE
Commission Member Comments: Appored probace / implementation Offen commincation	ion of ul,	langrag reigh bos	r senic 15.	es hu	facilit	ute
Charter Officer: Check self-evaluation rating	1	2	3	4	5	N/A
Berner a see Be	et to provide	services at	a level dire	ected by th	e Commiss	ion,
ensuring actions and decisions reflect an approp	et to provide riate level o	f responsibi	lity for fina	ncial plann	ing and acc	ountability
<ul> <li>Fiscal Management, Prepares a balanced budge ensuring actions and decisions reflect an approp</li> <li>Commission Member: Check competency rating</li> <li>Commission Member Comments:</li> </ul>	riate level o	e services at f responsibi 2	a level dire lity for fina	ected by th ncial plann	e Commiss ing and acc	ion, countability
ensuring actions and decisions reflect an approp commission Member: Check competency rating	riate level o	f responsibi	lity for fina	ncial plann	ing and acc	ountability



ť .:

Commission Member: Check competency	rating	1	2	3	4	5	
Commission Member Comments:						کرد	
	f						
Charter Officer: Check self-evaluation rati	ng	10	2	3	4	5	N/A
Charter Officer Comments:							
high standards in meeting the vision, n	establishes s hission and g	strategies goals of the	to develop a e departme	and maxim nt.	ize employ	ee perform	ance, foste
high standards in meeting the vision, n ommission Member: Check rating	establishes s hission and g	strategies goals of the 10	to develop a e departmen 2 🗆	and maxim nt. 30	ize employ	ee perform SØ	nce, foste
high standards in meeting the vision, n	nission and g	goals of the	e departmei 2	nt. 30	<b>*X</b>		
high standards in meeting the vision, n ommission Member: Check rating ommission Member Comments: Var varya	d dupts	10 10	2 2 y-sve	nt. 3□ e(feirunt	1	<u>s</u> Z	N/A
high standards in meeting the vision, n ommission Member: Check rating ommission Member Comments:	d dupts	goals of the	e departmei 2	nt. 30	<b>*X</b>		
high standards in meeting the vision, n ommission Member: Check rating ommission Member Comments: Vee vor vor	d dupts	10 10	2 2 y-sve	nt. 3□ e(feirunt	1	<u>s</u> Z	N/A
high standards in meeting the vision, n ommission Member: Check rating ommission Member Comments: Vee vor vor	nission and f d depts B	soals of the	2 2 2 2 2 2	nt. 3 e (feirnt 3	4	<u>s</u> Z	N/A



### Additional Goals Sheet

*Overall Support of City Commission Goals and O City's philosophy (vision, mission, values); actively pu how these relate to the Charter Officers' job and dep *Charter to attach Accomplishments Report for Eval Goal 2 - Describe Goal(s):	rsues an ur artment.	iderstandir	ites an unde ng of organi	erstanding zational go	of and sup als and obj	ports the ectives and
Commission Member: Check performance rating	1 🗆	2	30	4	5 🗆	N/A
Commission Member Comments:						
Charter Officer: Check self-evaluation rating	1	2□	3 🗆	4□	5	N/A
Charter Officer Comments:						
Goal 3 - Describe Goal(s):						
commission Member: Check performance rating	1 🗆	2□	3□	4	5□	N/A□
commission Member Comments:						
harter Officer: Check self-evaluation rating	1	2	3□	4	5	N/A
harter Officer Comments:						

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Fiscal Year: Fy2020	Evaluator	Gigi	Simm	nons	
Charter Officer: Lee Feldman	Title:	Gigi City	Mana	ser	
Goal(s) If needed use additional goals sheet (page .					
*Overall Support of City Commission Goals and Objectiv City's philosophy (vision, mission, values); actively pursues an how these relate to the Charter Officers' job and department *Charter to attach Accomplishments Report for Evaluation Describe Goal(s):	i understandii t.	ates an unde ng of organiz	rstanding c ational goa	of and supp als and obj	oorts the ectives and
Commission Member: Check performance rating 1		3	4	5	N/A 🗆
Due L Course - 19 Same	wals &	abirch	her 1	ne	
Due to Covid-19 Some g diffuit to achieve or doos not diminish or take addressing the impact of Charter Officer: Check self-evaluation rating 10	compa amay Covin soals	from from as in + obje	Hower The + imp. chiles	er, th task acts	is of ne
Charter Officer: Check self-evaluation rating 1	2□	3	4	5	N/A
Competencies: 1. Business Acumen. Understands the business, financial st responsibility; realizes implications of key financial indicat diagnose business strengths and weaknesses.	atus of the org ors, and uses	ganization ar	nd core ope nd industry	rational ár data to ac	ea of curately
Commission Member: Check competency rating 1	2 🗆	3 🗆	4	5	N/A
Commission Member Comments: Mr. Feldman fully understan financial Status and ope responsibilities.	ds p	e orge 1 are	nicati	دَسمن	
Charter Officer: Check self-evaluation rating 1	2□	3	4	5	N/A
Charter Officer Comments:					

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the City. Commission Member: Check competency rating	1	20	3	40	5	N/AC
Commission Member Comments: Need to work to in Communication and u all barriers across	poure 10 v K	. int trucas	enal es n	and mout	estr	- W
Charter Officer: Check self-evaluation rating						
Charter Officer Comments:	1	2	3	4	5	N/A
Fiscal Management. Prepares a balanced budget ensuring actions and decisions reflect an appropr	t to provide s iate level of	ervices at a esponsibili	ı level dire ty for finaı	cted by the nciál planni	Commissi ng and acc	on, ountability
ensuring actions and decisions reflect an appropr ommission Member: Check competency rating	t to provide s late level of 1	ervices at a esponsibili 2	i level dire ty for fina 30	cted by the cial planni	Commissing and acc	on, ountability N/A 🗆
ensuring actions and decisions reflect an appropr ommission Member: Check competency rating	iate level of	2 🗆	ty for final	nciál planni	ng and acc	ountability
ommission Member: Check competency rating ommission Member Comments:	iate level of	2 🗆	ty for final	nciál planni	ng and acc	ountability

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4. Integrity. Demonstrates the highest level of integrity and ethical behavior, adhering to the City's code of conduct upholding the values of the City, challenges questionable work standards and confronts or reports suspicious practices to appropriate leaders or authorities.

2 3 4	5 N/A
which ha	is put the ins the values, this
1 1	ing the
nd guestic	ins fre
duct and	values, this
6	
□ <u>3</u> □ 4	□ 5□ N/A□
	□ 5□ N/A□
artment.	nployee performance, foster
different	Things. Mr.
1 impander	A His
a improve	-01, 1113
ited for	things. Mr. mat, His his leadership
3 3 4	5 N/A
Date:	
— Date: 12/	15/20
or	m to Human Resources D



Additional Goals Sheet

*Overall Support of City Commission Goals and O City's philosophy (vision, mission, values); actively pur how these relate to the Charter Officers' job and depa *Charter to attach Accomplishments Report for Evalu Goal 2 - Describe Goal(s):	rsues an un artment.	iderstandir	ites an und ng of organi	erstanding zational go	of and supp bals and obj	oorts the ectives and
Commission Member: Check performance rating	1	2	3 🗆	4	5	N/A
Commission Member Comments:						
Charter Officer: Check self-evaluation rating	1	2	3 🗆	4	5	N/A
Charter Officer Comments: <u>Goal 3 - Describe Goal(s):</u>						
Commission Member: Check performance rating Commission Member Comments:	1	2	3	4	5	N/A
Charter Officer: Check self-evaluation rating	1	2	3 🗆	4	5	N/A
Charter Officer Comments:						



Fiscal Year: FY20		valuator		Ward		
Charter Officer: City Manager		itle:				
Soal(s) If needed use additional goals sheet (						
Overall Support of City Commission Goals and O	bjectives.	Demonstra	tes an und	erstanding	of and sup	ports the
City's philosophy (vision, mission, values); actively pur		derstandir	ig of organi	zational go	als and obj	ectives and
ow these relate to the Charter Officers' job and depa						
Charter to attach Accomplishments Report for Evalu Describe Goal(s): Equitable Community (1) Enhance to			and Informe	atter		
Including for all Neighbors (2) Expand the multi-lingual of Neighbors (3) Reduce the neighborhoods that are foor oods (4) Develop City equity tool (5) Have a City work and at all organization levels reflecting community der	capacity of d deserts w force that i	Communit ith all Neig s racially a	y Builders e hbors havi nd cultural	enhancing s ng conveni ly diverse i	ent access n all City de	our diverse to quality partments
leighbors to healthcare and other neighborhood service		,			ne access (c	/ (0)
Commission Member: Check performance rating	10	2	30	40	- 70	N/AC
ommission Member Comments:				1	0	
outer Officers Charles - If we take to the						
	4.00	-		4.57	1	1
narter Officer Comments: See City Manager Memora much work to be done here and will continue to wor	1 Indum No. 3 Indum No. 3	2 200054 da other Char	3 ted Octobe ter Officers	4⊠ r 30, 2020. to make p	5 I recognize rogress on 1	N/A that there these
narter Officer Comments: See City Manager Memora much work to be done here and will continue to wor	ndum No.	200054 da	ted Octobe	r 30, 2020.	I recognize	that there
harter Officer: Check self-evaluation rating harter Officer Comments: See City Manager Memora much work to be done here and will continue to wor bjectives.	ndum No. : k with the	200054 da other Char	ted Octobe ter Officers	r 30, 2020. to make p	I recognize rogress on 1	that there these
marter Officer Comments: See City Manager Memora much work to be done here and will continue to wor ojectives. mpetencies: Business Acumen. Understands the business, finan responsibility; realizes implications of key financial	ndum No. k with the ncial status	200054 day other Char	ted Octobe ter Officers anization a	r 30, 2020. to make p	I recognize rogress on t erational ar	that there these ea of
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arter Officer Comments: See City Manager Memora much work to be done here and will continue to wor jectives. <b>mpetencies:</b> <b>Business Acumen.</b> Understands the business, finan- responsibility; realizes implications of key financial diagnose business strengths and weaknesses. <b>mmission Member: Check competency rating</b>	ndum No. k with the ncial status indicators,	200054 da other Char of the org and uses 6	ted Octobe ter Officers anization a economic a	r 30, 2020. to make p nd core op nd industry	I recognize rogress on t erational ar	that there these ea of curately
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narter Officer Comments: See City Manager Memora much work to be done here and will continue to wor ojectives. mpetencies: Business Acumen. Understands the business, finan responsibility; realizes implications of key financial diagnose business strengths and weaknesses. mmission Member: Check competency rating mmission Member Comments:	ncial status Indicators,	of the org and uses of 200054 data	anization a conomic a	nd core op nd industry	I recognize rogress on t erational ar data to acc	that there these ea of curately
harter Officer Comments: See City Manager Memora much work to be done here and will continue to wor bjectives. <b>mpetencies:</b> Business Acumen. Understands the business, finan responsibility; realizes implications of key financial diagnose business strengths and weaknesses. Immission Member: Check competency rating mmission Member Comments: arter Officer: Check self-evaluation rating	ncial status Indicators,	200054 da other Char of the org and uses o	anization a conomic a	r 30, 2020. to make p nd core op nd industry 4	I recognize rogress on t erational ar	that there these ea of curately
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Ch Annual Perfor	arter ( mance			orm		
2. Communication and Building Relationships. C constructive feedback, promotes frank and open internal and external, promotes collaboration an the City.	discussions	s on issues.	. Cultivates	a network	k of relation	ships both
Commission Member: Check competency rating	10	2	3	40	50	N/A
Commission Member Comments: We New 7	6 que	Work	ou b	ildig	- Velat	Hasedos
Commission Member Comments: We New 7 between CM & Charter HAD	Ryistik s.	z−5eu	ior Und	ngauet	f Ollia	
Charter Officer: Check self-evaluation rating	10	2	3	4	5	N/A
Charter Officer Comments: See City Manager Memor						
Fiscal Management. Prepares a balanced budget ensuring actions and decisions reflect an appropri						
Commission Member: Check competency rating	10	2	3	4	55	N/A
Commission Member Comments: Very pleased t	ath the	fixed a	litations	400	PBUE	ko.
harter Officer: Check self-evaluation rating	10	20	3	4	52	N/A
Tharter Officer Comments: See City Manager Memora of a 2-year budget did not allow for full analysis of the apital planning and use of capital debt proceeds to me	budgetary p	rocess. FY	21 will pro			the middle



Commission Member: Check competency rating	10	2	30	40	-00-	
Commission Member Comments:	لساله	<u> </u>	3	4	5	N/A[
285						
Charter Officer: Check self-evaluation rating	10	20	3[]	4	52	N/A
Charter Officer Comments: See City Manager Memor	andum No.	200054 dat	ed Octobe	30, 2020.		1 14 14
Leading and Supervision. Effectively establishes	strategies to	o develop a	nd maximi	ze employe	e performa	ince, fost
high standards in meeting the vision, mission and	poals of the	donattmon				
high standards in meeting the vision, mission and pommission Member: Check rating ommission Member Comments:	10	2	3[]	4	5	N/A
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HR Form 01172019, Rev2020



### Additional Goals Sheet

*Overall Support of City Commission Goals and Ol City's philosophy (vision, mission, values); actively pur		Name and a state	Ann and sound	and a state		
City's philosophy (vision, mission, values); actively pure	Djecuves.	Demonstra	ites an uno	erstandinį	s of and su	pports the
		derstandin	ng ot organi	zational g	oals and ol	bjectives and
how these relate to the Charter Officers' job and depa						
*Charter to attach Accomplishments Report for Evalu			·	_		
Goal 2 - Describe Goal(s): Sustainable Community (1)	Increase t	he acreage	of natural/	conservat	ion lands (	2) Increase the
City's use of renewable resources with the goal of 100	% by 2045	or sooner	(3) Have m	ore neighi	oorhoods a	n City sewer
system, less number of failing septic systems (4) Enhan						
operating in an environmentally responsible manner (5	5) Pursue z	ero waste	goal (6) Red	duce the C	ity organiz	ation's carbon
footprint by 25% to achieve the climate change goal						
Commission Member: Check performance rating	10	2	3	4	5	N/A
Commission Member Comments:						14/7164
Charter Officer: Check self-evaluation rating	1	2	3	4	5	N/AD
Charter Officer Comments: See City Manager Memorar						
<u>Goal 3 - Describe Goal(s):</u> A Great Place to Live and Exp [ownership and rental] for all Neighbors and throughout Downtown with expanded residential and commercial o expanded and upgraded housing, well maintained and u serving the daily needs of Neighbors (4)Have medical an	t the Gaine pportuniti pgraded C d healthca	esville com es (3) Revil ity infrastri re services	munity (2)E talize easts ucture and available i	evelop a de neighb more neig	vibrant, aliv orhoods w hborhood	/e ith
for all Neighbors, focusing on the eastside (5) Provide an				e with fixe	d routes a	and access nd on-
for all Neighbors, focusing on the eastside (5) Provide an demand services accessible for all (6) Eliminate chronic h 50%(point of time)	nomelessn	ess and rec	duce transit	e with fixe ional hom	ed routes a elessness i	and access nd on-
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### Charter Officer Annual Performance Evaluation Form

### Additional Goals Sheet

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*Overall Support of City Commission Goals and C	bjectives.	Demonstrat	es an unde	erstanding	of and sup	ports the
City's philosophy (vision, mission, values); actively pu	rsues an un	derstanding	of organi	zational go	als and ob	jectives and
how these relate to the Charter Officers' job and dep	artment.					
*Charter to attach Accomplishments Report for Eval	uation Peri	od				
Goal 4 - Describe Goal(s): Resilient Local Economy (1)	Increase th	ne number o	f successf	ul and sust	tainable, si	mall and
locally owned businesses by % with ownership reflect	ing neighbo	ors (2) Redu	ce the pov	ertv level i	n the Gain	esville
community by 25% ranking with major university com	munities (3	) Have the t	echnology	/ infrastruc	ture/com	numity
broadband that is fast, reliable and affordable to supp	ort husines	ses and hor	ne offices	working f	rom home	(A) House
diverse local economy (industrial and business) insula	ted from ea	conomic tree	nds (5) Att	ract new h		to Coince d
consistent with our economic vision and "targeted" b	usinesses (A	i) Develop a	successfu	Minority/	Waman a	to Gamesvine
Business Enterprise (MWBE) program that is producin				i wini on Ly/	women-o	wned
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commission member comments:						
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Charter Officer: Check self-evaluation rating	10	2	3	40	5🖾	N/A
Charter Officer Comments: See City Manager Memora	indum No. 1	200054 date	ed October	r <b>30, 2020</b> .	The GNVC	Cares for
Business program demonstrates my commitment to as	sisting loca	l businesses	. FY21 wi	l see a stro	ng empha	isis in
General Government to buy local.						
						1
Goal 5 - Describe Goal(s): "Best in Class" Neighbor Ser	vices (1) Ma	aintain, hire	, train and	retain pro	fessional C	Community
<u>Goal 5 - Describe Goal(s):</u> "Best in Class" Neighbor Ser Builders dedicated to serving the Gainesvillecommunity	vices (1) Ma y (2) Develo	aintain, hire	, train and	retain pro-	fessional C	Community
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# **City of Gainesville**

Office of the City Manager

### City Manager Memorandum No. 200054

To: The Honorable Mayor and City Commission

From: Lee R. Feldman, ICMA-CM, City Manager Inf. lymo

Date: October 30, 2020

Re: City Manager Accomplishments

As of the writing of this memorandum I have served you and the neighbors of the City of Gainesville as your City Manager for just under one (1) year, the last seven and one-half months during the COVID-19 pandemic. The purpose of this memorandum is to outline achievements during that period. While the General Government team of community builders have had many accomplishments, I wish to highlight specific activities that I have either initiated or spearheaded (in no particular order of importance).

- On January 23, 2020 (with a revision on May 1, 2020) established the operational paradigm for the function of the portion of General Government under the City Manager's purview.
  - Promulgated the use of term "neighbor" to replace "citizen", "taxpayer", "resident" and other terms when referring to those individuals we serve.
  - Promulgated the use of the term "community builder" to replace "employee" to recognize the common mission and effort to build community for our neighbors.
  - Reorganized and consolidated various functions of General Government to create efficiencies, avoid duplication of efforts and reduce the span of control resulting in fewer departments and the establishment of offices to provide specific functionality within the City Manager's Office.
  - o Placed the public safety functions as direct reports to the City Manager.
  - Aligned the Communications and Neighbor Engagement functions of General Government within one office.
  - Established equity and inclusion as an enterprise-wide function assigned to an Assistant City Manager.
  - Set forth the process of establishing a vision, mission, strategic plan and an annual action plan for the City.
- Organized a strategic planning effort Involving administrative staff, other Charter Officers and the City Commission resulting in the adoption of a citywide vision.

mission, strategic plan, annual action plan of August 6, 2020. The annual action plan identified five (5) top priorities and eight (8) priorities to guide the work of General Government.

- Established PerformGNV as the accountability tool for the strategic plan and annual action plan elements under the responsibility of the City Manager.
- Brought to fruition the Annual Neighbor Survey to establish a system to benchmark
  perceptions of service delivery against other peer communities as well as creating
  historical data to continually measure neighbor impressions. [Note: this year this
  was completed out of sequence; starting in 2021 the neighbor survey will be
  conducted prior to the annual action plan and budget to feed necessary inputs into
  both processes.]. The neighbor survey is also deployed in an interactive tool to
  allow community builders and neighbors alike to explore its data.
- Examined the existing debt of the General Government of the City resulting in the issuance of \$206 million in new 2020 Pension Obligation Bonds. The transaction refunded 95% of the Unfunded Accrued Actuarial Liability (UAAL) of the City's 2 pension plans resulting in a combined Present Value Savings of \$114.5 million. This translates to \$16.8 million in savings In the first five (5) years for General Government and \$14.3 million in savings for GRU for the same period.
  - Despite the financial uncertainty resulting from revenue fluctuations due to COVID-19, the City maintained its Aa2 rating with Moody's and AA with Fitch.
- In the area of Budget and Finance:
  - Delivered a proposed General Government budget with no increase in the tax rate, the fire assessment fee or other fees which was adopted by the City Commission.
  - Retirned the City's contribution to its pension plans and saving the General Government over \$570,000 for FY21.
  - Reduced the reliance on "vacancy savings" to fund ongoing operational programs.
  - Proposed a new General Fund Balance policy which established a higher minimum fund balance and established a maximum fund balance ceiling and incorporated a minimum balance for emergencies. The policy was adopted by the City Commission.
  - Updated the City's Investment Policies (including a newly adopted policy for the Evergreen Cemetery Trust) and established quarterly reporting to the City Commission of the status of investments.
  - Negotiated a new multi-year agreement with the Alachua County School Board resulting in an increase in funding by the School Board of the School Resource Officer program.
- Co-designed the effort with Gainesville Police Department resulting in a reallocation
  of resources to increase funding for mental health co-responders, the dedication of

funding for the Reichert House and BOLD programs, and the deployment of body worn cameras for all sworn and some non-sworn field personnel (service technicians).

- Guided the General Government through the COVID-19 response with minimal disruption to municipal services; implemented remote working for a majority of community builders and redeployed community builders to other vital tasks to avoid layoffs and furloughs; created an online database to allow neighbors to track the City's enforcement efforts regarding facial coverings and business capacity compliance. Developed the Streatery program designed to move indoor bar/entertainment activity to the outdoors. Additionally, spearheaded an effort (currently underway) to identify methods to influence behavior to assist in efforts to reduce community spread.
- Initiated a Downtown Masterplan process, including the securing of a partnership for functing with the University of Florida, which will kick-off in the first quarter of 2021.
- Consolidated the General Government's real estate activities (sale/acquisition/leasing) into one office reporting to an Assistant City Manager. The City retained the services of a broker to assist in this activity and is currently preparing an inventory of all municipal land assets which can be more effectively utilized for opportunities such as affordable housing.
  - Proposed a modification to the City's Land Disposition Policy which allows for the more active marketing of municipal property for affordable housing. The policy was adopted by the City Commission. One letter of intent has been received by the City since the policy's adoption.
- During this past year I continued to serve on the Board of Directors of ICMA-RC (the entity which administers the City's 401(a) and 457 plans) and the National Civic League. I was also elected as a Tri-Chair of the National Homeland Security Consortium. I continue to be an active member of the National League of Cities' Crime Prevention and Public Safety Committee and the Florida League of Cities' Municipal Administration Committee.

Let me conclude by emphasizing that none of the above efforts were singular in nature. I have been fortunate to work with a great team of hard working and creative community builders who have been instrumental in many accomplishments. We remain committed to the mission of building community.

I thank you for the opportunity to serve.

### WE BUILD COMMUNITY.

# GAINEY



Charter Officer:       Control of the second strength str	Fiscal Year: FY20		valuator		<ul> <li>Arreola</li> </ul>	1	
Goal(s) If needed use additional goals sheet (page 5):       /         *Overall Support of City Commission Goals and Objectives. Demonstrates an understanding of and supports the City's philosophy (vision, mission, values); actively purces an understanding of organizational goals and objectives and how these relate to the Charter Officer's job and department.         *Charter to attach Accomplishments Report for Evaluation Period         Describe Goal(s):         Commission Member: Check performance rating       1       2       3       4       5k2       N/A         Commission Member: Check performance rating       1       2       3       4       5k2       N/A         Commission Member: Check performance rating       1       2       3       4       5k2       N/A         Commission Member: Check performance rating       1       2       3       4       5k2       N/A         Commission Member: Check performance rating       1       2       3       4       5k2       N/A         Commission Member: Check self-evaluation rating       1       2       3       4       5       N/A         Charter Officer: Check self-evaluation rating       1       2       3       4       5       N/A         Charter Officer: Check self-evaluation of key financial indicators, and uses economic and industry data to accurately diagnose business strength	Charter Officer: O Contoe	Т	itle: ()	La clar	K		
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internal and external, promotes collaboration an the City.						
Commission Member: Check competency rating	1	2□	3□	4	5	N/A
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harter Officer: Check self-evaluation rating	1□	2	3	4	5	N/A
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Commission Member: Check competency rating	1	2□	3	4	5 🕅	N/A
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Charter Officer: Check self-evaluation rating	10	2□	3	4	5	N/A
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HR Form 01172019, Rev2020



Additional Goals Sheet

*Overall Support of City Commission Goals and Ob City's philosophy (vision, mission, values); actively purs how these relate to the Charter Officers' job and depar *Charter to attach Accomplishments Report for Evalua Goal 2 - Describe Goal(s):	ues an und tment.	erstanding	es an unde 3 of organiz	rstanding ational go	of and supp als and obje	orts the octives and
Commission Member: Check performance rating	1 🗌	2	30	4	5	N/A
Commission Member Comments:						
Charter Officer: Check self-evaluation rating	1	2	3 🗆	4	5	N/A
Charter Officer Comments:				~		
Goal 3 - Describe Goal(s):						

Commission Member: Check performance rating	1 🗆	2□	3	4	5	N/A
Commission Member Comments:						
Charter Officer: Check self-evaluation rating	1	2	3□	4	5	N/A
Charter Officer Comments:						

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### Charter Officer Annual Performance Evaluation Form

### Introduction:

The City Commission is responsible for conducting Charter Officer annual evaluations ensuring the Charter contributes to the achievement of the City's mission, vision and goals. Charter Officer performance evaluations shall be conducted after the conclusion of each fiscal year.

The purpose of the Charter Officer evaluation is to provide timely, clear and focused input to the Charter about how well he or she is performing in the key performance areas identified as most critical by the City Commission in achieving the City of Gainesville's strategic objectives.

The Charter Officer should be evaluated using criteria established by the Commission, aligning with established core competencies, review rating scale criteria and salary adjustment schedules as determined by Human Resources. Human Resources will notify the Commission at least one month in advance of performance evaluation due dates. Annual salary increases will be based on the Charter Officer's performance of established objectives in the prior fiscal year. Any annual awards are made based on market considerations and according to budgetary or fiscal constraints.

### **Commission Instructions:**

Evaluate the Charter Officer's performance for each area of accountability using the rating scale outlined below. Consider all criteria together when forming an impression about the Charter Officer's performance. Add comments you believe provide context to your rating or that would be helpful to the Charter Officer.

		Performance Descriptors and Rating Scale
5	Superior	Work performance consistently exceeds all performance expectations and displays a consistent level of exceptional performance. This is consistent, exceptional performance.
4	Exemplary	Work performance consistently achieves all performance expectations and key elements of performance consistently are carried out in an exceptional manner or sustained periods. This is consistent, outstanding performance.
3	Meets Expectations	Work performance consistently achieves all performance expectations for this factor.
2	Needs Improvement	Work performance on one or more elements is less than expected and requires some improvements to fully meet performance standards.
1	Did Not Meet Expectations	Work performance within this factor is unacceptable. Performance did not meet expected performance standards.

Ratings 2 or below should include comments and if applicable provide specific suggestions for performance improvement.

### **Charter Officer Instructions and Next Steps:**

- Using the above Rating Scale, the Charter Officer will self-evaluate and rate his or her performance. The Charter Officer should also attach his or her Accomplishments List or Report to the form.
- Charter Officer to submit completed self-evaluation and accomplishments report to Human Resources.
- Charter Officer to schedule individual evaluation discussion meetings with each Commission member to discuss selfevaluation and list of accomplishments. Charters should also be prepared to discuss objectives for next fiscal year.
- After reviewing the Charter Officer self-evaluation and accomplishments report with the Charter Officer, each Commission member will provide an evaluation rating, using the above Rating Scale.
- Following Commission and Charter performance evaluation discussion, completed performance evaluations are returned to Human Resources.
- Human Resources will compile and aggregate all Charter Officer evaluation ratings, coordinate and present for discussion during a publicly noticed Commission meeting. Note: Salary increases are budgeted in a personal services contingency account and recommended salary increases will be processed within established payroll processing timelines.

Fiscal Year: 2020	Eval	uator: A	drian Ha	yes-Sant	OS	
Charter Officer: Omichele Gainey	Title	: Clerk				
Goal(s): *Overall Support of City Commission Goals and Object City's philosophy (vision, mission, values); actively pursues how these relate to the Charter Officers' job and departme *Charter to attach Accomplishments Report for Evaluation Describe Goal(s): Discussed in meeting	s an under ent.			-		
Commission Member: Circle performance rating	1 🗌	2□	3⊠	4🗆	5 🗆	N/A□
Commission Member Comments:						
Charter Officer: Circle self-evaluation rating	1	2□	3□	4□	5 🗆	N/A□
Charter Officer Comments: Competencies: 1. Business Acumen. Understands the business, financia		f the average				of
responsibility; realizes implications of key financial inc		-				
diagnose business strengths and weaknesses.					· _ '	
	1□	2⊠	3□	4□	5□	N/A□
Commission Member Comments:						
Charter Officer: Check self-evaluation rating	1□	2□	3□	4	5□	N/A□
Charter Officer Comments:						

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2. Communication and Building Relationships. Com constructive feedback, promotes frank and open dis internal and external, promotes collaboration and re the City.	scussions or	n issues. Cu	ltivates a n	etwork of r	elationship	s both
Commission Member: Check competency rating	1🗆	2⊠	3 🗆	4	5 🗆	N/A□
Commission Member Comments:						
Charter Officer: Check self-evaluation rating	1□	2□	3□	4□	5 🗆	N/A□
Charter Officer Comments:						

3. Fiscal Management. Prepares a balanced budget to ensuring actions and decisions reflect an appropriat				•		
Commission Member: Check competency rating	1	2□	3 🗆	4⊠	5 🗆	N/A🗆
Commission Member Comments:						
Charter Officer: Check self-evaluation rating	1□	2□	3 🗆	4□	5 🗆	N/A□
Charter Officer Comments:						

4. Integrity. Demonstrates the highest level of inte				-	-	
upholding the values of the City, challenges ques	stionable wo	rk standard	s and conf	ronts or rep	ports suspic	cious
practices to appropriate leaders or authorities.						
Commission Member: Check competency rating	1□	2□	3□	4⊠	5 🗆	N/A□
Commission Member Comments:		1				
Charter Officer: Check self-evaluation rating	1□	2□	3□	4	5	N/A□
Charter Officer Comments:						
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high standards in meeting the vision, mission and	-	-		inze employ	ee periorii	iunee, 1050
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	1□	2⊠	3	4	5	N/A
	1	2⊠	3	4	5	N/A 🗆
	1	2⊠	3	4	5	<u>N/A□</u>
	1	2⊠	3	4	5	N/A□
	1	2⊠	3	4	5	N/A
	1	2⊠	3	4	5	N/A
Commission Member Comments:	1□	2⊠	3	4	5	N/A□
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Commission Member Comments: Charter Officer: Check self-evaluation rating	1	2	<b>3</b> □ Date:	4	5	N/A□

Gainesville.

Citizen centered People empowered

# Charter Officer Annual Performance Evaluation Form – Omichele Gainey

### Introduction:

The City Commission is responsible for conducting Charter Officer annual evaluations ensuring the Charter contributes to the achievement of the City's mission, vision and goals. Charter Officer performance evaluations shall be conducted after the conclusion of each fiscal year.

The purpose of the Charter Officer evaluation is to provide timely, clear and focused input to the Charter about how well he or she is performing in the key performance areas identified as most critical by the City Commission in achieving the City of Gainesville's strategic objectives.

The Charter Officer should be evaluated using criteria established by the Commission, aligning with established core competencies, review rating scale criteria and salary adjustment schedules as determined by Human Resources. Human Resources will notify the Commission at least one month in advance of performance evaluation due dates. Annual salary increases will be based on the Charter Officer's performance of established objectives in the prior fiscal year. Any annual awards are made based on market considerations and according to budgetary or fiscal constraints.

### **Commission Instructions:**

Evaluate the Charter Officer's performance for each area of accountability using the rating scale outlined below. Consider all criteria together when forming an impression about the Charter Officer's performance. Add comments you believe provide context to your rating or that would be helpful to the Charter Officer.

237		Performance Descriptors and Rating Scale
5	Superior	Work performance consistently exceeds all performance expectations and displays a consistent level of exceptional performance. This is consistent, exceptional performance.
4	Exemplary	Work performance consistently achieves all performance expectations and key elements of performance consistently are carried out in an exceptional manner or sustained periods. This is consistent, outstanding performance.
3	Meets Expectations	Work performance consistently achieves all performance expectations for this factor.
2	Needs Improvement	Work performance on one or more elements is less than expected and requires some improvements to fully meet performance standards.
1	Did Not Meet Expectations	Work performance within this factor is unacceptable. Performance did not meet expected performance standards.

Ratings 2 or below should include comments and if applicable provide specific suggestions for performance improvement.

### **Charter Officer Instructions and Next Steps:**

- Using the above Rating Scale, the Charter Officer will self-evaluate and rate his or her performance. The Charter Officer should also attach his or her Accomplishments List or Report to the form.
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- Charter Officer to schedule individual evaluation discussion meetings with each Commission member to discuss selfevaluation and list of accomplishments. Charters should also be prepared to discuss objectives for next fiscal year.
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- Human Resources will compile and aggregate all Charter Officer evaluation ratings, coordinate and present for discussion during a publicly noticed Commission meeting. Note: Salary increases are budgeted in a personal services contingency account and recommended salary increases will be processed within established payroll processing timelines.

# **Charter Officer**

Annual Performance Evaluation Form – Omichele Gainey

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Charter Officer:	Т	itle:	,			
Goal(s) If needed use additional goals sheet *Overall Support of City Commission Goals and O City's philosophy (vision, mission, values); actively pu how these relate to the Charter Officers' job and dep *Charter to attach Accomplishments Report for Eva Describe Goal(s):	<b>Objectives.</b> Irsues an ui partment.	nderstandir				
Commission Member: Check performance rating	1 🗆	2□				
Commission Member: Creck performance rating		Z L	3	4	50	N/A
Charter Officer: Check self-evaluation rating						
	1	2	3	4	5	N/A
Charter Officer Comments:						
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Charter Officer Comments: Competencies: I. Business Acumen. Understands the business, fin responsibility; realizes implications of key financia diagnose business strengths and weaknesses. Commission Member: Check competency rating	ancial statu	is of the org	ganization a	nd core op	erational a	rea of
Charter Officer Comments: Competencies: I. Business Acumen. Understands the business, fin responsibility; realizes implications of key financia diagnose business strengths and weaknesses.	ancial statu al indicators	is of the org s, and uses	ganization a economic a	nd core op nd industry	erational a data to ac	rea of curately

# Charter Officer Annual Performance Evaluation Form – Omichele Gainey

Charter Officer Comments:	4 lirected by th	5 🗆	N/A
Charter Officer Comments: B. Fiscal Management. Prepares a balanced budget to provide services at a level direct	lirected by th	h	
<ol> <li>Fiscal Management. Prepares a balanced budget to provide services at a level direct</li> </ol>	irected by th		
ensuring actions and decisions reflect an appropriate level of responsibility for finan	man in all all all all all all all all all al	ie commiss	ión,
Commission Member: Check competency rating 1 2 3			
Commission Member: Check competency rating     1     2     3       Commission Member Comments:     2     3	4	5	N/AD
Charter Officer: Check self-evaluation rating 1 2 3	4	5	N/A

HR Form 01172019,Rev2020

# **Charter Officer** Annual Performance Evaluation Form – Omichele Gainey

<ol> <li>Integrity. Demonstrates the highest level of inte upholding the values of the City, challenges ques practices to appropriate leaders or authorities.</li> </ol>	egrity and e stionable w	thical behav ork standar	vior, adheri ds and con	ng to the C fronts or re	ity's code ( ports susp	of conduct icious
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Charter Officer: Check self-evaluation rating	1	2□	3□	4	5	N/A
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high standards in meeting the vision, mission and Commission Member: Check rating Commission Member Comments: Charter Officer: Check self-evaluation rating	goals of the	e departme	nt. 3	4	5	N/A

#### **Commissioner Johnson Charter Officers Evaluation**

12/23/20

FY 20

This has been a challenging year. I appreciate the work of our charter officers to keep the city running. You all have adapted, pivoted when needed, and put the safety of our community builders and neighbors first. You all have done this through stressful events, sometimes with children at home and a host of other responsibilities. You have done this while keeping the goals of a very ambitious and very engaged commission at the forefront. This is not to be taken lightly, and in this regard, you all are s/heroes. Doing an evaluation during the best of times is challenging. In the middle of a global pandemic, it is more than challenging, to say the least. My personal challenge has been distinguishing between what is "normal" during this time, because there is no normal; and balancing my expectations from the beginning of the year until now. With the understanding that there are grey areas, nuance and involve over 2200 community builders that support your work, I offer some of my thoughts.

**Ed Bielarski** has done an effective job as the General Manager. He is knowledgeable in all aspects of the utility and does a good job building and motivating his team of over 1000 employees. Ed has an ability to consistently tell the Commission not what it wants to hear, but what it needs to hear. I believe that this leads to better decision making and a better understanding of the impacts of our decision on the utility. Mr. Bielarski is a big supporter of his team, it is my hope that this support does not lead to blind spots and/or disparate outcomes in the treatment of some employees.

As the newest member of the team, **Ginger Bigbie** has made admirable and quick work of staffing her office. During the time Auditor Bigbie has been with the city, there has been significant progress made on goals. There is also a clear path forward for the function of this office and a very clear willingness and ability to integrate the function of this office with the goals of the commission. I appreciate the non-linear thinking and ways to problem solve that have been exhibited by Ginger Bigbie.

Lee Feldman has done a fantastic job with the strategic action plan for the commission/organization and aligning it with specific projects and outcomes. The issuance of the new 2020 Pension Obligation Funds was an astute decision. Many other decisions made by the city manager are clearly rooted in decades of experience, experience that serves this city well. This experience is also why I am concerned about the level of professionalism the city manager has exhibited (as indicated in recent reports), when leading and working with community builders and charter officers. It is my expectation that a shift will occur in his leadership style, communication, and level of transparency. It is also my hope and expectation that the city manager will actively address cultural problems that have been exacerbated by recent events.

**Omichelle Gainey** has been reliable, consistent and highly effective in managing the roles and duties of her office. She has hired an amazing team that is also highly effective in their jobs. I appreciate the work that her office does that directly impacts the success of the commission, most notably, the policy research team. Clerk Gainey is always looking for ways to improve processes. In 2021, I look forward to progress that will be made as it relates to the board and committees. With an improved process and partnerships, I believe that we can have boards and committees that are reflective of our community.

Teneeshia Marshall has done a great job with the core functions of the Office of Equal Opportunity. Her strengths and abilities are in compliance, investigation and monitoring. As the transition from the Office of Equal Opportunity to the Office of Equity and Inclusion happens, with more responsibilities and an enhanced mission, I look forward to the following; a laser sharp focus on building out effective core equity teams throughout all of general government; a concerted effort to build a functioning racial equity task force; a useful racial equity toolkit and a process about when, where, how and by whom it should be used; and staff to be able to execute the goals as agreed upon by the commission. I believe that with consistent communication, imagination and working collaboratively with charter officers on the goals, we will get to a place we can all be proud of.

Through difficult to navigate situations, Mrs. Marshall has been professional and acted with integrity. Her prior experience in investigations as well as her character have served the city well.

**Nicolle Shalley** is highly ethical and able to provide a balanced view of issues. Although I have never fully understood the boundaries of what is permissible to expect from her office, she seems to do a good job at delegating and balancing the many issues that have a legal component. Providing updates to the commission on where projects are in the pipeline with her office has been helpful. I look forward to the following in 2021; processes put in place for stated goals to happen more expeditiously and/or an established timeline for high priority goals and ordinances; better communication and general assistance for simplistic questions and/or tasks.

As we continue the ambitious work of the city and commission in 2021, I hope that as a team, the charter officers will all assist in Goal 1 of the strategic plan- an equitable community. This aligns with a city racial equity policy and plan. I see this as a function of all of our charter officers working collaboratively and most importantly, a partnership between the office of equity and inclusion and the city manager's office. My hope for this city is a functioning, healthy city as measured by social determinants and a willingness to address poverty in our city. The opportunity gaps are growing with each day that passes, and I believe that the biggest challenges that lie ahead will be the negative outcomes associated with housing, health, education and our food system.

Thank you for all that you all do. None of it is easy, but I appreciate that you all keep on showing up. All of you have the hearts of public servants and want the best for Gainesville.

Sincerely,

**Commissioner Johnson** 



### Introduction:

The City Commission is responsible for conducting Charter Officer annual evaluations ensuring the Charter contributes to the achievement of the City's mission, vision and goals. Charter Officer performance evaluations shall be conducted after the conclusion of each fiscal year.

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### **Commission Instructions:**

Evaluate the Charter Officer's performance for each area of accountability using the rating scale outlined below. Consider all criteria together when forming an impression about the Charter Officer's performance. Add comments you believe provide context to your rating or that would be helpful to the Charter Officer.

CAPE -	and the second	Performance Descriptors and Rating Scale
5	Superior	Work performance consistently exceeds all performance expectations and displays a consistent level of exceptional performance. This is consistent, exceptional performance.
4	Exemplary	Work performance consistently achieves all performance expectations and key elements of performance consistently are carried out in an exceptional manner or sustained periods. This is consistent, outstanding performance.
3	Meets Expectations	Work performance consistently achieves all performance expectations for this factor.
2	Needs Improvement	Work performance on one or more elements is less than expected and requires some improvements to fully meet performance standards.
1	Did Not Meet Expectations	Work performance within this factor is unacceptable. Performance did not meet expected performance standards.

# Ratings 2 or below should include comments and if applicable provide specific suggestions for performance improvement.

### **Charter Officer Instructions and Next Steps:**

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- Following Commission and Charter performance evaluation discussion, completed performance evaluations are returned to Human Resources.
- Human Resources will compile and aggregate all Charter Officer evaluation ratings, coordinate and present for discussion during a publicly noticed Commission meeting. Note: Salary increases are budgeted in a personal services contingency account and recommended salary increases will be processed within established payroll processing timelines.



Fiscal Year: 2020	Evaluator:	POE			
Charter Officer: C. L. Clerk	Title: 1				
Goal(s) If needed use additional goals sheet (page	2 5):				
*Overall Support of City Commission Goals and Object City's philosophy (vision, mission, values); actively pursues how these relate to the Charter Officers' job and departme *Charter to attach Accomplishments Report for Evaluation	an understanding int.	; of organiza	standing of tional goal	s and obje	orts the ctives and
Describe Goal(s): 1. Equitable Community 2. Sester noble Community					
3. Great Place to Live & Exp 4. Rosiliant Local Economy					
5. Best In Class Neighbor Se		1			
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diagnose business strengths and weaknesses.			Cari de	t states	
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Commission Member Comments:	11 L L		cia 1		
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Charter Officer Comments:					
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Charter Officer: Check self-evaluation rating	10	2	3	4	5	N/A
Charter Officer Comments:						
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Commission Member: Check rating	1[]	2	3	4	5500	N/A
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Additional Goals Sheet

*Overall Support of City Commission Goals and C City's philosophy (vision, mission, values); actively pu how these relate to the Charter Officers' job and dep *Charter to attach Accomplishments Report for Eva Goal 2 - Describe Goal(s):	irsues an u partment.	inderstandir	ng of organ	erstanding izational go	als and obj	ports the ectives and
Please see (5) goals city commission.	as	ado p	red	514	he	
city commission.						
Commission Member: Check performance rating	1	2	3	4	5[]	N/A
Commission Member Comments:						
Charter Officer: Check self-evaluation rating	1	2□	3	4	5[]	N/A
Charter Officer Comments: Goal 3 - Describe Goal(s):						
Commission Member: Check performance rating	1	2	3	4	5	N/A
Commission Member Comments:	1					
Charter Officer: Check self-evaluation rating	1	2□	3	4	5	N/A
Charter Officer Comments:						



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	E	valuator	:: Comm	issioner l	Reina Sao	co
Charter Officer: Omichele Gainey	Г	'itle: Cit	y Clerk			
Goal(s) If needed use additional goals shee						
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Commission Member: Check performance rating Commission Member Comments:	1 🗆	2	3 🗆	4	5	N/A
Charter Officer: Check self-evaluation rating	1	2[]	3	4	5	N/A
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Business Acumen. Understands the business, f	cial indicators	s, and uses	economic	and industr	y data to ac	curately.
<ul> <li>Business Acumen. Understands the business, f responsibility; realizes implications of key finan- diagnose business strengths and weaknesses.</li> </ul>	inancial statu cial indicators	s of the or s, and uses	ganization economic 3	and core op and industr	erational a y data to ac 5	rea of curately.
<ul> <li>Business Acumen. Understands the business, f responsibility; realizes implications of key finan- diagnose business strengths and weaknesses.</li> <li>ommission Member: Check competency rating</li> </ul>	cial indicators	s, and uses	economic	and industr	y data to ac	curately.



Commission Member Comments:		2	3	4	5	
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Charter Officer: Check self-evaluation rating	1□	2□	3□	4	5□	N/A
ensuring actions and decisions reflect an approp	oriate level of	f responsibi	lity for fina	ncial plann	ing and acc	countability
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ommission Member: Check competency rating	10	2	3	4	55	N/A
Commission Member Comments:						
Charter Officer: Check self-evaluation rating	1	2	3	4	5	N/A
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high standards in meeting the vision, mission and Commission Member: Check rating				iže employo	ee perform	ance, foste
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Charter Officer - Omichele Gainey

# **Annual Performance Evaluation Form**

### Additional Goals Sheet

*Overall Support of City Commission Goals and O City's philosophy (vision, mission, values); actively pu how these relate to the Charter Officers' job and dep *Charter to attach Accomplishments Report for Eval Goal 2 - Describe Goal(s):	rsues an un artment.	derstandir	tes an und ng of organi	erstanding zational go	of and supp als and obj	ports the ectives and
<b>Commission Member: Check performance rating</b> Commission Member Comments:	1 🗆	2	3□	4	5	N/A□
common de commento.						
Charter Officer: Check self-evaluation rating	10	2	3 🗆	4	5	N/A
Charter Officer Comments:						
				1		
Commission Member: Check performance rating Commission Member Comments:	1	2	3	4	5	N/A 🗆
Charter Officer: Check self-evaluation rating	1	2	3	4	5 🗆	N/A
Charter Officer Comments:			 			

HR Form 01172019,Rev2020



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Fiscal Year: Evaluator:	
F9 2020	nbi Simmon
Charter Officer: Oprichelle Gainen Title: Cite	y Clerk
Goal(s) If needed use additional goals sheet (page 5):	1
*Overall Support of City Commission Goals and Objectives. Demonstrates an City's philosophy (vision, mission, values); actively pursues an understanding of or how these relate to the Charter Officers' job and department. *Charter to attach Accomplishments Report for Evaluation Period Describe Goal(s):	understanding of and supports the rganizational goals and objectives and
Commission Member: Check performance rating       1       2       3         Commission Member Comments:       .	
Commission Member Comments: Due to Covid-19 some goals were diffault to achieve or	s + objective,
the to coviding solice of	
were diffault to achieve or	complete. However,
this does not diminish the ha.	rd work and
dedication put forth thus tar.	•
Charter Officer: Check self-evaluation rating     1     2     3       Charter Officer Comments:     1     1     1     1	□ 4□ 5□ N/A□
Competencies:	
1. Business Acumen. Understands the business, financial status of the organizati	ion and core operational area of
responsibility; realizes implications of key financial indicators, and uses econor	
diagnose business strengths and weaknesses.         Commission Member: Check competency rating       1       2       3	
Commission Member: Check Competency rating	
Maneze your department extreme	ly vell.
Charter Officer: Check self-evaluation rating 1 2 3	4 5 N/A
Charter Officer Comments:	

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internal and external, promotes collaboration a the City.	en discussion	is on issues.	<b>Cultivates</b>	network	o receiving of relation es, builds c	chins both
Commission Member: Check competency rating	1	2	3 🗆	4	50	N/A
Commission Member Comments: Communi ca fe ve gula beyond to cuttiva external Excell	anly te re lent jo	and lation ub du	gors ship	s ab s in Cov	10-10	+ nl + 9.
Charter Officer: Check self-evaluation rating	10	2	3	4	5	N/A
3. Fiscal Management. Prepares a balanced budg ensuring actions and decisions reflect an approp	et to provide priate level of	services at Fresponsibil	a level dire ity for finar	cted by the icial planni	Commissi ng and acc	on, ountability.
ensuring actions and decisions reflect an appropro- Commission Member: Check competency rating	et to provide priate level of 10	services at fresponsibil	a level dire ity for finar 3	cted by the icial planni	Commissi ng and acc	on, ountability.
ensuring actions and decisions reflect an approp	priate level of	f responsibil	ity for finar	icial planni	ng and acc	ountability.
ensuring actions and decisions reflect an approp Commission Member: Check competency rating Commission Member Comments:	priate level of	f responsibil	ity for finar	icial planni	ng and acc	ountability.



Commission Member: Check competency rating	1	2	3	4	5	N/A
Commission Member Comments:						
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harter Officer: Check self-evaluation rating	10	2	3 🗆	4	5	N/A
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high standards in meeting the vision, mission and	goals of the	e departmer	nt. 3	4	50	N/A
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high standards in meeting the vision, mission and	goals of the	e departmer	nt. 3	4	50	N/A
high standards in meeting the vision, mission and mmission Member: Check rating mmission Member Comments: MS. Gainey lead has assembled a staff.	s by Kne	2 2 CK	anpl anpl gebe	40 12. Ca 2. 7	50 nol Cap	N/A
high standards in meeting the vision, mission and mmission Member: Check rating mmission Member Comments: MS. Gainey lead has assembled a Staff. arter Officer: Check self-evaluation rating	goals of the	e departmer	nt. 3	4	50	N/A
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Additional Goals Sheet

*Overall Support of City Commission Goals and O City's philosophy (vision, mission, values); actively pu how these relate to the Charter Officers' job and dep *Charter to attach Accomplishments Report for Eval Goal 2 - Describe Goal(s):	rsues an ur artment.	nderstandin	ates an und ng of organ	erstanding zational go	of and supp bals and obj	oorts the ectives and
<b>Commission Member: Check performance rating</b>	1 🗌	2	3 🗆	4	5	N/A
Commission Member Comments:						
Charter Officer: Check self-evaluation rating	1	2	3 🗆	4	5	N/A
Charter Officer Comments: Goal 3 - Describe Goal(s):						
Commission Member: Check performance rating Commission Member Comments:	1	2	3	4	5	N/A
Charter Officer: Check self-evaluation rating	1	2	3	4	5	N/A
Charter Officer Comments:						

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#### Introduction:

The City Commission is responsible for conducting Charter Officer annual evaluations ensuring the Charter contributes to the achievement of the City's mission, vision and goals. Charter Officer performance evaluations shall be conducted after the conclusion of each fiscal year.

The purpose of the Charter Officer evaluation is to provide timely, clear and focused input to the Charter about how well he or she is performing in the key performance areas identified as most critical by the City Commission in achieving the City of Gainesville's strategic objectives.

The Charter Officer should be evaluated using criteria established by the Commission, aligning with established core competencies, review rating scale criteria and salary adjustment schedules as determined by Human Resources. Human Resources will notify the Commission at least one month in advance of performance evaluation due dates. Annual salary increases will be based on the Charter Officer's performance of established objectives in the prior fiscal year. Any annual awards are made based on market considerations and according to budgetary or fiscal constraints.

#### **Commission Instructions:**

Evaluate the Charter Officer's performance for each area of accountability using the rating scale outlined below. Consider all criteria together when forming an impression about the Charter Officer's performance. Add comments you believe provide context to your rating or that would be helpful to the Charter Officer.

		Performance Descriptors and Rating Scale
5	Superior	Work performance consistently exceeds all performance expectations and displays a consistent level of exceptional performance. This is consistent, exceptional performance.
4	Exemplary	Work performance consistently achieves all performance expectations and key elements of performance consistently are carried out in an exceptional manner or sustained periods. This is consistent, outstanding performance.
3	Meets Expectations	Work performance consistently achieves all performance expectations for this factor.
2	Needs Improvement	Work performance on one or more elements is less than expected and requires some improvements to fully meet performance standards.
1	Did Not Meet Expectations	Work performance within this factor is unacceptable. Performance did not meet expected performance standards.

Ratings 2 or below should include comments and if applicable provide specific suggestions for performance improvement.

#### **Charter Officer Instructions and Next Steps:**

- Using the above Rating Scale, the Charter Officer will self-evaluate and rate his or her performance. The Charter Officer should also attach his or her Accomplishments List or Report to the form.
- Charter Officer to submit completed self-evaluation and accomplishments report to Human Resources.
- Charter Officer to schedule individual evaluation discussion meetings with each Commission member to discuss selfevaluation and list of accomplishments. Charters should also be prepared to discuss objectives for next fiscal year.
- After reviewing the Charter Officer self-evaluation and accomplishments report with the Charter Officer, each Commission member will provide an evaluation rating, using the above Rating Scale.
- Following Commission and Charter performance evaluation discussion, completed performance evaluations are returned to Human Resources.
- Human Resources will compile and aggregate all Charter Officer evaluation ratings, coordinate and present for discussion during a publicly noticed Commission meeting. Note: Salary increases are budgeted in a personal services contingency account and recommended salary increases will be processed within established payroll processing timelines.



			: Omiche		ard	I L'VAI
Charter Officer: Omichele D. Gainey		itle: Cit			aru	
oal(s) If needed use additional goals sheet	(page 5):					
*Overall Support of City Commission Goals and C City's philosophy (vision, mission, values); actively pu how these relate to the Charter Officers' job and dep *Charter to attach Accomplishments Report for Eva	irsues an ur artment. <b>Iuation Per</b> i	iderstandir od	ng of organ	izational go	als and obje	ctives and
Describe Goal(s): No goals were set for my role by the keep records and perform such other duties as prese accomplishments for this and all other sections of the sections of the sections o	cribed by th	is act or th	ne commiss	ion. My pe	rsonal goals	and
Commission Member: Check performance rating	10	2□	3□	4	A	N/A
Commission Member Comments:	10					
harter Officer: Check self-evaluation rating	10	2□	30	4⊠	5	N/A
Business Acumen. Understands the business, fin responsibility; realizes implications of key financia						
<ul> <li>Business Acumen. Understands the business, fin responsibility; realizes implications of key financia diagnose business strengths and weaknesses.</li> </ul>						urately
<ul> <li>Business Acumen. Understands the business, fin responsibility; realizes implications of key financia diagnose business strengths and weaknesses.</li> <li>ommission Member: Check competency rating</li> </ul>	al indicators	, and uses	economic a	and industry		
<ul> <li>Business Acumen. Understands the business, fin responsibility; realizes implications of key financia diagnose business strengths and weaknesses.</li> <li>ommission Member: Check competency rating ommission Member Comments:</li> </ul>	al indicators	, and uses	economic a	and industry		urately
	1 Indicators	, and uses	economic a	and industry	/ data to acc	urately
Business Acumen. Understands the business, fin responsibility; realizes implications of key financia diagnose business strengths and weaknesses. ommission Member: Check competency rating ommission Member Comments:	1 Indicators	, and uses	economic a	and industry	/ data to acc	N/A

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### **Charter Officer Annual Performance Evaluation Form**

Commission Member: Check competency rating	1	2	3	40	608	N/A
Commission Member Comments: Game System H System H System H	to king	fsrwood ops Con. Mission	to h & st itur n, As	SAM-	Style sizes of USSes	being
harter Officer: Check self-evaluation rating	10	2	3	4⊠	5	N/AE
Fiscal Management. Prepares a balanced budge ensuring actions and decisions reflect an appropr	t to provide iate level o	services at f responsibi	a level dire lity for fina	cted by th ncial plann	e Commissi ing and acc	on, ountabilit
ensuring actions and decisions reflect an appropr ommission Member: Check competency rating	t to provide iate level o	services at f responsibi	a level dire lity for fina 3	cted by th ncial plann	e Commissi ing and acc	on, countability <b>N/A</b>
ensuring actions and decisions reflect an appropr ommission Member: Check competency rating	iate level o	f responsibi	lity for fina	ncial plann	e Commissi ing and acc	ountability
Fiscal Management. Prepares a balanced budge ensuring actions and decisions reflect an appropr ommission Member: Check competency rating ommission Member Comments:	iate level o	f responsibi	lity for fina	ncial plann	e Commissi ing and acc	ountability

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Commission Member: Check competency rating	1	20	3	4	A	
Commission Member Comments:			30		175-	
Charter Officer: Check self-evaluation rating	1	20	3□	4⊠	5	N/A[
inarter Officer Comments.						
high standards in meeting the vision, mission and	s strategies i goals of the	to develop a e departme	and maxim nt.	ize employ	ee perform	iance, fost
high standards in meeting the vision, mission and Commission Member: Check rating	s strategies f goals of the	to develop a e departmen 20	and maxim nt. 3	ize employ	ee perform	N/A
high standards in meeting the vision, mission and commission Member: Check rating commission Member Comments: harter Officer: Check self-evaluation rating	goals of the	e departme	nt	lze employ		
<ul> <li>5. Leading and Supervision. Effectively establishes high standards in meeting the vision, mission and Commission Member: Check rating</li> <li>Commission Member Comments:</li> </ul>	goals of the	e departme	at. 3⊡	<u></u>	5	<u>N/A</u>
high standards in meeting the vision, mission and Commission Member: Check rating Commission Member Comments: Charter Officer: Check self-evaluation rating	goals of the	e departme	at	<u></u>	5	N/A

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### **Charter Officer Annual Performance Evaluation Form**

Additional Goals Sheet

*Overall Support of City Commission Goals and C City's philosophy (vision, mission, values); actively pu how these relate to the Charter Officers' job and dep *Charter to attach Accomplishments Report for Eval	<b>Dbjectives.</b> rsues an un artment. I <b>uation Peri</b>	Demonstra Iderstandir <b>od</b>	ites an und ig of organi	erstanding zational go	of and supp als and obj	ports the ectives and
<u>Goal 2 - Describe Goal(s):</u>						
Commission Member: Check performance rating	1 🗆	2□	3□	4□	5	N/A□
Commission Member Comments:		.,,				
Charter Officer: Check self-evaluation rating	10	2	3	4	5	N/A□
Charter Officer Comments:						
Goal 3 - Describe Goal(s):						
Commission Member: Check performance rating	10	2□	3□	4[]	5□	N/A□
Commission Member Comments:						
Charter Officer: Check self-evaluation rating	1[]	2	3□	4	5	N/A

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# MARSHALL



#### Introduction:

The City Commission is responsible for conducting Charter Officer annual evaluations ensuring the Charter contributes to the achievement of the City's mission, vision and goals. Charter Officer performance evaluations shall be conducted after the conclusion of each fiscal year.

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#### **Commission Instructions:**

Evaluate the Charter Officer's performance for each area of accountability using the rating scale outlined below. Consider all criteria together when forming an impression about the Charter Officer's performance. Add comments you believe provide context to your rating or that would be helpful to the Charter Officer.

1	S	Performance Descriptors and Rating Scale
5	Superior	Work performance consistently exceeds all performance expectations and displays a consistent level of exceptional performance. This is consistent, exceptional performance.
4	Exemplary	Work performance consistently achieves all performance expectations and key elements of performance consistently are carried out in an exceptional manner or sustained periods. This is consistent, outstanding performance.
3	Meets Expectations	Work performance consistently achieves all performance expectations for this factor.
2	Needs Improvement	Work performance on one or more elements is less than expected and requires some improvements to fully meet performance standards.
1	Did Not Meet Expectations	Work performance within this factor is unacceptable. Performance did not meet expected performance standards.

# Ratings 2 or below should include comments and if applicable provide specific suggestions for performance improvement.

#### **Charter Officer Instructions and Next Steps:**

- Using the above Rating Scale, the Charter Officer will self-evaluate and rate his or her performance. The Charter Officer should also attach his or her Accomplishments List or Report to the form.
- Charter Officer to submit completed self-evaluation and accomplishments report to Human Resources.
- Charter Officer to schedule individual evaluation discussion meetings with each Commission member to discuss selfevaluation and list of accomplishments. Charters should also be prepared to discuss objectives for next fiscal year.
- After reviewing the Charter Officer self-evaluation and accomplishments report with the Charter Officer, each Commission member will provide an evaluation rating, using the above Rating Scale.
- Following Commission and Charter performance evaluation discussion, completed performance evaluations are returned to Human Resources.
- Human Resources will compile and aggregate all Charter Officer evaluation ratings, coordinate and present for discussion during a publicly noticed Commission meeting. Note: Salary increases are budgeted in a personal services contingency account and recommended salary increases will be processed within established payroll processing timelines.



Fiscal Year: FYD		valuator:	DA	Arre	eola	
Charter Officer: T. Moshall	T	itle: E.O.	DICE	Apr		
Goal(s) If needed use additional goals sheet (						
*Overall Support of City Commission Goals and O City's philosophy (vision, mission, values); actively pur how these relate to the Charter Officers' job and depa *Charter to attach Accomplishments Report for Evalue Describe Goal(s):	rsues an ur artment.	nderstanding	es an und of organi	erstanding zational go	of and sup bals and obj	ports the ectives and
Commission Member: Check performance rating	1 🗆	2	3	4	5	N/A
Well Jone.						
	1	2	3	4	5	N/A
Charter Officer Comments: Competencies: I. Business Acumen. Understands the business, fina	incial statu	s of the orga	nization a	nd core op	erational a	rea of
<ul> <li>Charter Officer: Check self-evaluation rating</li> <li>Charter Officer Comments:</li> <li>Competencies:</li> <li>Business Acumen. Understands the business, fina responsibility; realizes implications of key financial diagnose business strengths and weaknesses.</li> </ul>	incial statu l indicators	s of the orga , and uses ed	nization a conomic a	nd core op	erational a	rea of
Charter Officer Comments: Competencies: 1. Business Acumen. Understands the business, fina responsibility; realizes implications of key financial diagnose business strengths and weaknesses. Commission Member: Check competency rating	incial statu	s of the orga	nization a	nd core op	erational a	rea of
Charter Officer Comments: Competencies: 1. Business Acumen. Understands the business, fina responsibility; realizes implications of key financial diagnose business strengths and weaknesses.	incial statu l indicators	s of the orga , and uses ed	nization a conomic a	nd core op nd industr	erational ai y data to ac	rea of curately
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Charter Officer Comments: Competencies: 1. Business Acumen. Understands the business, fina responsibility; realizes implications of key financial diagnose business strengths and weaknesses. Commission Member: Check competency rating Commission Member Comments: Consistent PCF200000.	incial statu l indicators	s of the orga , and uses ed	nization a conomic a	nd core op nd industr	erational ai y data to ac	rea of curately
Charter Officer Comments: Competencies: 1. Business Acumen. Understands the business, fina responsibility; realizes implications of key financial diagnose business strengths and weaknesses. Commission Member: Check competency rating Commission Member Comments: Consistent Performed. Consistent Performed.	incial statu l indicators	s of the orga , and uses ed	nization a conomic a	nd core op nd industr	erational ai y data to ac	rea of curately



the City. Commission Member: Check competency rating	40	- C				
Commission Member: Check competency rating	1□	2□	3	4	5	N/A
Well done.						
Charter Officer: Check self-evaluation rating	1	2	3	4	5	N/A
Charter Officer Comments:						N/AL
		_				
Fiscal Management. Prepares a balanced budge ensuring actions and decisions reflect an appropri	t to provide iate level of	services at responsibil	a level dire ity for finar	cted by the ncial planni	Commissi	on, ountability
Fiscal Management. Prepares a balanced budge ensuring actions and decisions reflect an appropri- ommission Member: Check competency rating ommission Member Comments: Conststert Performed.	t to provide iate level of	services at responsibil	a level dire ity for finar 3	cted by the ncial planni	Commissi ng and acc	on, ountability N/A
ensuring actions and decisions reflect an appropriation of the second se	iate level of	responsibil	ity for finar	ncial plánni	ng and acc	ountability
ensuring actions and decisions reflect an appropr ommission Member: Check competency rating ommission Member Comments:	iate level of	responsibil	ity for finar	ncial plánni	ng and acc	ountability
ensuring actions and decisions reflect an appropriation of the self-evaluation rating actions and decisions reflect an appropriation rating action act	iate level of	responsibil	ity for finai	42	ng and acc	ountability

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commission Member: Check competency rating	10	2□	3 🗆	4	5 🕅	N/A
Commission Member Comments:					-4	197463
Well Jone.						
Charter Officer: Check self-evaluation rating	1	2	3	4	5 🗆	N/A□
Charter Officer Comments:						
5. Leading and Supervision. Effectively establishes high standards in meeting the vision, mission and				ze employ	e perform	iance, foste
high standards in meeting the vision, mission and Commission Member: Check rating				ze employ	ee perform	nance, foste
high standards in meeting the vision, mission and Commission Member: Check rating	goals of the	departme	nt.			
high standards in meeting the vision, mission and Commission Member: Check rating Commission Member Comments: Well Jone, Charter Officer: Check self-evaluation rating	goals of the	departme	nt. 3□			-
Commission Member: Check rating Commission Member Comments:	goals of the	e departme	nt. 3	4	5,220	N/A

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Additional Goals Sheet

*Overall Support of City Commission Goals and C City's philosophy (vision, mission, values); actively pu how these relate to the Charter Officers' job and dep *Charter to attach Accomplishments Report for Eval	rsues an ur artment.	nderstandir	ites an unde ng of organi	erstanding zational go	of and sup als and obj	ports the ectives and
<u>Goal 2 - Describe Goal(s):</u>						
Commission Member: Check performance rating	1 🗆	2	3	4	5 🗆	N/A
Commission Member Comments:						
Charter Officer: Check self-evaluation rating	1	2□	3 🗆	4	5	N/A
Charter Officer Comments: Goal 3 - Describe Goal(s):						
Commission Member: Check performance rating Commission Member Comments:	1 🗆	2	3	4	5 🗆	N/A
Charter Officer: Check self-evaluation rating	10	2	3	4	5	N/A
Charter Officer Comments:						

#### Gainesville. Citizen centered People empowered

### Charter Officer Annual Performance Evaluation Form

#### Introduction:

The City Commission is responsible for conducting Charter Officer annual evaluations ensuring the Charter contributes to the achievement of the City's mission, vision and goals. Charter Officer performance evaluations shall be conducted after the conclusion of each fiscal year.

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#### **Commission Instructions:**

Evaluate the Charter Officer's performance for each area of accountability using the rating scale outlined below. Consider all criteria together when forming an impression about the Charter Officer's performance. Add comments you believe provide context to your rating or that would be helpful to the Charter Officer.

		Performance Descriptors and Rating Scale
5	Superior	Work performance consistently exceeds all performance expectations and displays a consistent level of exceptional performance. This is consistent, exceptional performance.
4	Exemplary	Work performance consistently achieves all performance expectations and key elements of performance consistently are carried out in an exceptional manner or sustained periods. This is consistent, outstanding performance.
3	Meets Expectations	Work performance consistently achieves all performance expectations for this factor.
2	Needs Improvement	Work performance on one or more elements is less than expected and requires some improvements to fully meet performance standards.
1	Did Not Meet Expectations	Work performance within this factor is unacceptable. Performance did not meet expected performance standards.

Ratings 2 or below should include comments and if applicable provide specific suggestions for performance improvement.

#### **Charter Officer Instructions and Next Steps:**

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- Following Commission and Charter performance evaluation discussion, completed performance evaluations are returned to Human Resources.
- Human Resources will compile and aggregate all Charter Officer evaluation ratings, coordinate and present for discussion during a publicly noticed Commission meeting. Note: Salary increases are budgeted in a personal services contingency account and recommended salary increases will be processed within established payroll processing timelines.

Fiscal Year: 2020	Eval	uator: A	drian Ha	yes-Sant	OS	
Charter Officer: Teneeshia Marshall	Title	: EOD				
Goal(s): *Overall Support of City Commission Goals and Object City's philosophy (vision, mission, values); actively pursues how these relate to the Charter Officers' job and departme *Charter to attach Accomplishments Report for Evaluation Describe Goal(s): Discussed in meeting	an under nt.			-		
Commission Member: Circle performance rating 1		2□	3□	4⊠	5□	N/A□
Commission Member Comments:		20				
Charter Officer: Circle self-evaluation rating 1		2□	3□	4□	5□	N/A□
Charter Officer Comments: Competencies: Business Acumen. Understands the business, financia responsibility; realizes implications of key financial indi		-		-		
diagnose business strengths and weaknesses.	,.			,		,
		2□	3□	4⊠	5□	N/A□
Commission Member Comments:						
		2□	3□	4□	5□	N/A□
Charter Officer Comments:						

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### **Charter Officer Annual Performance Evaluation Form**

2. Communication and Building Relationships. Com constructive feedback, promotes frank and open dis internal and external, promotes collaboration and re the City.	scussions o	n issues. Cu	ltivates a n	etwork of r	elationship	s both
Commission Member: Check competency rating	1□	2□	3⊠	4	5 🗆	N/A🗆
Commission Member Comments:						
Charter Officer: Check self-evaluation rating	1□	2□	3□	4□	5 🗆	N/A□
Charter Officer Comments:						

3. Fiscal Management. Prepares a balanced budget t ensuring actions and decisions reflect an appropria	•			•		-
Commission Member: Check competency rating	1□	2□	3□	4⊠	5 🗆	N/A□
Commission Member Comments:						
Charter Officer: Check self-evaluation rating	1	2□	3🗆	4	5 🗆	N/A□
Charter Officer Comments:						

4. Integrity. Demonstrates the highest level of inte				-	-	
upholding the values of the City, challenges ques	tionable wo	rk standard	s and conf	ronts or rej	ports suspic	ious
practices to appropriate leaders or authorities.						
Commission Member: Check competency rating	1□	2□	3□	4⊠	5□	N/A□
Commission Member Comments:		1				
Charter Officer: Check self-evaluation rating	1□	2□	3□	4□	5 🗆	N/A□
Charter Officer Comments:						
5. Leading and Supervision. Effectively establishes	s strategies <sup>+</sup>	to develop a	and maxim	ize employ	ee perform	ance, fost
high standards in meeting the vision, mission and	-	-		1 /		,
Commission Member: Check rating	1□	2□	3□	4⊠	5	N/A□
Commission Member Comments:						
	10	2□	3□	4□	5	N/A
	1	2□	3	4	5□	N/A
	1	2□	3	4	5□	N/A
	1	2	3	4	5	N/A
	1	2	3	4	5	N/A
	1	2	3	4	5	N/A
	1	2	3	4	5	N/A⊑
	1	2	3	4	5	N/A
	1	2	3	4	5	N/A□
Charter Officer: Check self-evaluation rating Charter Officer Comments: harter Officer Signature:					5	
Charter Officer Comments:			Date:			

Gainesville.

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### Charter Officer Annual Performance Evaluation Form – Teneeshia Marshall

#### Introduction:

The City Commission is responsible for conducting Charter Officer annual evaluations ensuring the Charter contributes to the achievement of the City's mission, vision and goals. Charter Officer performance evaluations shall be conducted after the conclusion of each fiscal year.

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#### **Commission Instructions:**

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2226		Performance Descriptors and Rating Scale
5	Superior	Work performance consistently exceeds all performance expectations and displays a consistent level of exceptional performance. This is consistent, exceptional performance.
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3	Meets Expectations	Work performance consistently achieves all performance expectations for this factor.
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Ratings 2 or below should include comments and if applicable provide specific suggestions for performance improvement.

#### **Charter Officer Instructions and Next Steps:**

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### **Charter Officer**

Annual Performance Evaluation Form – Teneeshia Marshall

Fiscal Year: FY20		valuator:	John	son		
Charter Officer:	T	itle:				
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### Charter Officer Annual Performance Evaluation Form – Teneeshia Marshall

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HR Form 01172019,Rev2020

### Charter Officer Annual Performance Evaluation Form – Teneeshia Marshall

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#### **Commissioner Johnson Charter Officers Evaluation**

12/23/20

FY 20

This has been a challenging year. I appreciate the work of our charter officers to keep the city running. You all have adapted, pivoted when needed, and put the safety of our community builders and neighbors first. You all have done this through stressful events, sometimes with children at home and a host of other responsibilities. You have done this while keeping the goals of a very ambitious and very engaged commission at the forefront. This is not to be taken lightly, and in this regard, you all are s/heroes. Doing an evaluation during the best of times is challenging. In the middle of a global pandemic, it is more than challenging, to say the least. My personal challenge has been distinguishing between what is "normal" during this time, because there is no normal; and balancing my expectations from the beginning of the year until now. With the understanding that there are grey areas, nuance and involve over 2200 community builders that support your work, I offer some of my thoughts.

**Ed Bielarski** has done an effective job as the General Manager. He is knowledgeable in all aspects of the utility and does a good job building and motivating his team of over 1000 employees. Ed has an ability to consistently tell the Commission not what it wants to hear, but what it needs to hear. I believe that this leads to better decision making and a better understanding of the impacts of our decision on the utility. Mr. Bielarski is a big supporter of his team, it is my hope that this support does not lead to blind spots and/or disparate outcomes in the treatment of some employees.

As the newest member of the team, **Ginger Bigbie** has made admirable and quick work of staffing her office. During the time Auditor Bigbie has been with the city, there has been significant progress made on goals. There is also a clear path forward for the function of this office and a very clear willingness and ability to integrate the function of this office with the goals of the commission. I appreciate the non-linear thinking and ways to problem solve that have been exhibited by Ginger Bigbie.

Lee Feldman has done a fantastic job with the strategic action plan for the commission/organization and aligning it with specific projects and outcomes. The issuance of the new 2020 Pension Obligation Funds was an astute decision. Many other decisions made by the city manager are clearly rooted in decades of experience, experience that serves this city well. This experience is also why I am concerned about the level of professionalism the city manager has exhibited (as indicated in recent reports), when leading and working with community builders and charter officers. It is my expectation that a shift will occur in his leadership style, communication, and level of transparency. It is also my hope and expectation that the city manager will actively address cultural problems that have been exacerbated by recent events.

**Omichelle Gainey** has been reliable, consistent and highly effective in managing the roles and duties of her office. She has hired an amazing team that is also highly effective in their jobs. I appreciate the work that her office does that directly impacts the success of the commission, most notably, the policy research team. Clerk Gainey is always looking for ways to improve processes. In 2021, I look forward to progress that will be made as it relates to the board and committees. With an improved process and partnerships, I believe that we can have boards and committees that are reflective of our community.

Teneeshia Marshall has done a great job with the core functions of the Office of Equal Opportunity. Her strengths and abilities are in compliance, investigation and monitoring. As the transition from the Office of Equal Opportunity to the Office of Equity and Inclusion happens, with more responsibilities and an enhanced mission, I look forward to the following; a laser sharp focus on building out effective core equity teams throughout all of general government; a concerted effort to build a functioning racial equity task force; a useful racial equity toolkit and a process about when, where, how and by whom it should be used; and staff to be able to execute the goals as agreed upon by the commission. I believe that with consistent communication, imagination and working collaboratively with charter officers on the goals, we will get to a place we can all be proud of.

Through difficult to navigate situations, Mrs. Marshall has been professional and acted with integrity. Her prior experience in investigations as well as her character have served the city well.

**Nicolle Shalley** is highly ethical and able to provide a balanced view of issues. Although I have never fully understood the boundaries of what is permissible to expect from her office, she seems to do a good job at delegating and balancing the many issues that have a legal component. Providing updates to the commission on where projects are in the pipeline with her office has been helpful. I look forward to the following in 2021; processes put in place for stated goals to happen more expeditiously and/or an established timeline for high priority goals and ordinances; better communication and general assistance for simplistic questions and/or tasks.

As we continue the ambitious work of the city and commission in 2021, I hope that as a team, the charter officers will all assist in Goal 1 of the strategic plan- an equitable community. This aligns with a city racial equity policy and plan. I see this as a function of all of our charter officers working collaboratively and most importantly, a partnership between the office of equity and inclusion and the city manager's office. My hope for this city is a functioning, healthy city as measured by social determinants and a willingness to address poverty in our city. The opportunity gaps are growing with each day that passes, and I believe that the biggest challenges that lie ahead will be the negative outcomes associated with housing, health, education and our food system.

Thank you for all that you all do. None of it is easy, but I appreciate that you all keep on showing up. All of you have the hearts of public servants and want the best for Gainesville.

Sincerely,

**Commissioner Johnson** 



### Charter Officer<sup>M</sup> Annual Performance Evaluation Form

#### Introduction:

The City Commission is responsible for conducting Charter Officer annual evaluations ensuring the Charter contributes to the achievement of the City's mission, vision and goals. Charter Officer performance evaluations shall be conducted after the conclusion of each fiscal year.

The purpose of the Charter Officer evaluation is to provide timely, clear and focused input to the Charter about how well he or she is performing in the key performance areas identified as most critical by the City Commission in achieving the City of Gainesville's strategic objectives.

The Charter Officer should be evaluated using criteria established by the Commission, aligning with established core competencies, review rating scale criteria and salary adjustment schedules as determined by Human Resources. Human Resources will notify the Commission at least one month in advance of performance evaluation due dates. Annual salary increases will be based on the Charter Officer's performance of established objectives in the prior fiscal year. Any annual awards are made based on market considerations and according to budgetary or fiscal constraints.

#### Commission Instructions:

Evaluate the Charter Officer's performance for each area of accountability using the rating scale outlined below. Consider all criteria together when forming an impression about the Charter Officer's performance. Add comments you believe provide context to your rating or that would be helpful to the Charter Officer.

F	Cumarian	Performance Descriptors and Rating Scale
5	Superior	Work performance consistently exceeds all performance expectations and displays a consistent level of exceptional performance. This is consistent, exceptional performance.
4	Exemplary	Work performance consistently achieves all performance expectations and key elements of performance consistently are carried out in an exceptional manner or sustained periods. This is consistent, outstanding performance.
3	Meets Expectations	Work performance consistently achieves all performance expectations for this factor.
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1	Did Not Meet Expectations	Work performance within this factor is unacceptable. Performance did not meet expected performance standards.

## Ratings 2 or below should include comments and if applicable provide specific suggestions for performance improvement.

#### **Charter Officer Instructions and Next Steps:**

- Using the above Rating Scale, the Charter Officer will self-evaluate and rate his or her performance. The Charter Officer should also attach his or her Accomplishments List or Report to the form.
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Commission Member Signature:	$\bigcirc$ —	P	Date: 12/18/20	

Return fully completed Charter Officer Performance Evaluation form to Human Resources Director, Box 20

HR Form 01172019,Rev2020



Additional Goals Sheet

*Overall Support of City Commission Goals and City's philosophy (vision, mission, values); actively p how these relate to the Charter Officers' job and de *Charter to attach Accomplishments Report for Ev Goal 2 - Describe Goal(s):	oursues an un epartment. aluation Peri	derstandir od	ng of organi	izational go	als and obje	orts the ctives and
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Commission Member: Check performance rating Commission Member Comments:	1	2	3	4	5	N/A
Charter Officer: Check self-evaluation rating	10	2	3	4	5	N/A
Charter Officer Comments:						



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Charter Officer: Teneeshia Marshall	1	fitle: Eq	ual Oppo	ortunity ]	Director		
Goal(s) If needed use additional goals sheet (page 5): *Overall Support of City Commission Goals and Objectives. Demonstrates an understanding of and supports the City's philosophy (vision, mission, values); actively pursues an understanding of organizational goals and objectives and how these relate to the Charter Officers' job and department. *Charter to attach Accomplishments Report for Evaluation Period Describe Goal(s):							
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#### Additional Goals Sheet

<b>*Overall Support of City Commission Goals and C</b> City's philosophy (vision, mission, values); actively pu how these relate to the Charter Officers' job and dep <b>*Charter to attach Accomplishments Report for Eval</b> <i>Goal 2 - Describe Goal(s):</i>	rsues an ur artment.	nderstandiı	ites an und ng of organi	erstanding zational go	of and sup als and obj	ports the ectives and
Commission Member: Check performance rating						
Commission Member: Check performance rating	1 🗆	2□	3 🗆	4	5	N/A□
Charter Officer: Check self-evaluation rating	1	2	3 🗆	4	5	N/A
Charter Officer Comments: Goal 3 - Describe Goal(s):						
Commission Member: Check performance rating					_	
Commission Member: Check performance rating	1	2	3	4	5	N/A
harter Officer: Check self-evaluation rating	1	2□	3	4	5	N/A
Charter Officer Comments:				7	3	N/A

HR Form 01172019,Rev2020



#### Introduction:

The City Commission is responsible for conducting Charter Officer annual evaluations ensuring the Charter contributes to the achievement of the City's mission, vision and goals. Charter Officer performance evaluations shall be conducted after the conclusion of each fiscal year.

The purpose of the Charter Officer evaluation is to provide timely, clear and focused input to the Charter about how well he or she is performing in the key performance areas identified as most critical by the City Commission in achieving the City of Gainesville's strategic objectives.

The Charter Officer should be evaluated using criteria established by the Commission, aligning with established core competencies, review rating scale criteria and salary adjustment schedules as determined by Human Resources. Human Resources will notify the Commission at least one month in advance of performance evaluation due dates. Annual salary increases will be based on the Charter Officer's performance of established objectives in the prior fiscal year. Any annual awards are made based on market considerations and according to budgetary or fiscal constraints.

#### **Commission Instructions:**

Evaluate the Charter Officer's performance for each area of accountability using the rating scale outlined below. Consider all criteria together when forming an impression about the Charter Officer's performance. Add comments you believe provide context to your rating or that would be helpful to the Charter Officer.

		Performance Descriptors and Rating Scale
5	Superior	Work performance consistently exceeds all performance expectations and displays a consistent level of exceptional performance. This is consistent, exceptional performance.
4	Exemplary	Work performance consistently achieves all performance expectations and key elements of performance consistently are carried out in an exceptional manner or sustained periods. This is consistent, outstanding performance.
3	Meets Expectations	Work performance consistently achieves all performance expectations for this factor.
2	Needs Improvement	Work performance on one or more elements is less than expected and requires some improvements to fully meet performance standards.
1	Did Not Meet Expectations	Work performance within this factor is unacceptable. Performance did not meet expected performance standards.

# Ratings 2 or below should include comments and if applicable provide specific suggestions for performance improvement.

#### **Charter Officer Instructions and Next Steps:**

- Using the above Rating Scale, the Charter Officer will self-evaluate and rate his or her performance. The Charter Officer should also attach his or her Accomplishments List or Report to the form.
- Charter Officer to submit completed self-evaluation and accomplishments report to Human Resources.
- Charter Officer to schedule individual evaluation discussion meetings with each Commission member to discuss selfevaluation and list of accomplishments. Charters should also be prepared to discuss objectives for next fiscal year.
- After reviewing the Charter Officer self-evaluation and accomplishments report with the Charter Officer, each Commission member will provide an evaluation rating, using the above Rating Scale.
- Following Commission and Charter performance evaluation discussion, completed performance evaluations are returned to Human Resources.
- Human Resources will compile and aggregate all Charter Officer evaluation ratings, coordinate and present for discussion during a publicly noticed Commission meeting. Note: Salary increases are budgeted in a personal services contingency account and recommended salary increases will be processed within established payroll processing timelines.



Fiscal Year: FY2020	E	valuator:	Gibi	Sim	non	,
Charter Officer: Teneeshia Ma	shall	itle: Dir.	ector	Faut	t	Trecher
Goal(s) If needed use additional goals sheet (	page 5):			- qui se	F	DR MAG
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City's philosophy (vision, mission, values); actively pur	sues an un	derstanding	of organiza	ational goal	s and obj	ectives and
how these relate to the Charter Officers' job and depa						
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this does Not dimin	ish	The	hard	wor	k a	nal
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MS. Marshall com internal and extarnal hard in addressing a	inal re	monia	3 60	anics	0	7 LON
Charter Officer: Check self-evaluation rating	1	2	3 🗆	4	5	N/A
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• Fiscal Management, Prepares a balanced budge ensuring actions and decisions reflect an appropriate	iate level of	f responsibi	a level dire	ected by the ncial plannin	Commissi g and acc	on, ountability.
ensuring actions and decisions reflect an approprior of the second secon	t to provide iate level of 1	f responsibi	a level dire lity for fina	ected by the ncial plannir	Commilssi g and acc	on, ountability.
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ensuring actions and decisions reflect an approprior of a section of the section	iate level of 1□	f responsibi	lity for fina	ncial plannir	ig and acc	ountability.



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Commission Member: Check competency rating Commission Member Comments:	1	2	3	4	5	N/A
commoder wenner comments.	N/X	1				
Charter Officer: Check self-evaluation rating	1	2	3□	4	5	N/AC
harter Officer Comments:						
<ul> <li>Leading and Supervision. Effectively establishes high standards in meeting the vision, mission and</li> </ul>				ze employe	ee perform	ance, fost
			<u></u>	4[7]	507	N/ACT
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HR Form 01172019, Rev2020



Additional Goals Sheet

*Overall Support of City Commission Goals and C City's philosophy (vision, mission, values); actively pur how these relate to the Charter Officers' job and dep *Charter to attach Accomplishments Report for Eval Goal 2 - Describe Goal(s):	rsues an ur artment.	derstandin	tes an unde 1g of organi	erstanding zational go	of and supp als and obje	orts the actives and
Commission Member: Check performance rating	1 🗆	2	3	4□	5	N/A
Commission Member Comments:						
Charter Officer: Check self-evaluation rating	1	2	3	4	5	N/A
<u>Goal 3 - Describe Goal(s):</u>						
Commission Member: Check performance rating	1 🗆	2	3	4	5	N/A
Commission Member Comments:						
Charter Officer: Check self-evaluation rating	1	2	3	4	5	N/A
Charter Officer Comments:						

#### Gainesville. Citizen centered

People empowered

### Charter Officer Annual Performance Evaluation Form

#### Introduction:

The City Commission is responsible for conducting Charter Officer annual evaluations ensuring the Charter contributes to the achievement of the City's mission, vision and goals. Charter Officer performance evaluations shall be conducted after the conclusion of each fiscal year.

The purpose of the Charter Officer evaluation is to provide timely, clear and focused input to the Charter about how well he or she is performing in the key performance areas identified as most critical by the City Commission in achieving the City of Gainesville's strategic objectives.

The Charter Officer should be evaluated using criteria established by the Commission, aligning with established core competencies, review rating scale criteria and salary adjustment schedules as determined by Human Resources. Human Resources will notify the Commission at least one month in advance of performance evaluation due dates. Annual salary increases will be based on the Charter Officer's performance of established objectives in the prior fiscal year. Any annual awards are made based on market considerations and according to budgetary or fiscal constraints.

#### **Commission Instructions:**

Evaluate the Charter Officer's performance for each area of accountability using the rating scale outlined below. Consider all criteria together when forming an impression about the Charter Officer's performance. Add comments you believe provide context to your rating or that would be helpful to the Charter Officer.

	Performance Descriptors and Rating Scale
Superior	Work performance consistently exceeds all performance expectations and displays a consistent level of exceptional performance. This is consistent, exceptional performance.
Exemplary	Work performance consistently achieves all performance expectations and key elements of performance consistently are carried out in an exceptional manner or sustained periods. This is consistent, outstanding performance.
Meets Expectations	Work performance consistently achieves all performance expectations for this factor.
Needs Improvement	Work performance on one or more elements is less than expected and requires some improvements to fully meet performance standards.
Did Not Meet Expectations	Work performance within this factor is unacceptable. Performance did not meet expected performance standards.
	Exemplary Meets Expectations Needs Improvement Did Not Meet

Ratings 2 or below should include comments and if applicable provide specific suggestions for performance improvement.

#### **Charter Officer Instructions and Next Steps:**

- Using the above Rating Scale, the Charter Officer will self-evaluate and rate his or her performance. The Charter Officer should also attach his or her Accomplishments List or Report to the form.
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HR Form 01172019

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### Charter Officer Annual Performance Evaluation Form

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Fiscal Year: FY2020	1	Dyalualy	r: Mayor	. roe		
Charter Officer: Teneeshia Marshall	1	Title: Eq	ual Opp	ortunity	Director	P
Goal(s):				and the second se		
*Overall Support of City Commission Goals and City's philosophy (vision, mission, values); actively how these relate to the Charter Officers' job and d *Charter to attach Accomplishments Report for En Describe Goal(s): My goal for fiscal year FY2019 was stabilize the office. Three high priority focus areas f disparity study. Additionally, my goal is to always fi Programs was to work on backlog reduction and wo goal was to start implementing equity programs up had a coal of atting a disparity for the start in the start is start in the start in the start in the start is start in the start is start in the start is start in the start in t	pursues an u epartment. valuation Pe as to continu for FY2020 w ulfill the nee ork towards on the adop	nderstand ie to establi vere: Comp ds of the fu meeting the tion of equi	sh office ar liance prog Il City Com 100 day o	id organiza rams, Equ mission. Th	ational nee ity Program he goal wit	bjectives and ds and ns and the ch Complianc
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Commission Member: Circle performance rating Commission Member Comments:	1 🗆	20	3	42	50	N/AC
	10	2	30	42	5	N/A
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Office of Equity and Inclusion 222. E University Avenue P.O. Box 490 Station 52 Gainesville, FL 32601 (352) 334-5051

DATE:	October 28, 2020
TO:	Honorable Mayor and Members of the City Commission
FROM:	Teneeshia L. Marshall, Equal Opportunity Director TLM
RE:	FY2020 Performance Achievements

I am providing the following information to assist you in evaluating my performance as the Office of Equity Inclusion Director for the fiscal year period from October 1, 2019 to September 30, 2020. If you would like to discuss my performance prior to your public discussions of Charter Officer evaluations, please give me a call or have your assistant schedule a meeting directly through Outlook. Additionally, I am always open to questions and feedback regarding my work performance all year. I am looking forward to serving the City of Gainesville another year as the Office of Equity and Inclusion Director.

#### ROLE, RESPONSIBILITIES, and PROFESSIONAL OBLIGATIONS OF THE OFFICE OF EQUITY AND INCLUSION

To properly evaluate my performance, it is important to understand the roles and responsibilities of the Office of Equity and Inclusion. The Office of Equity and Inclusion adopted a new mission last fiscal year. The new mission is, "provides expertise, tools, data and programming to promote diversity, equity and inclusion.

Our core function is to ensure equal opportunity/equal access to employment, housing, public accommodations and credit within the Gainesville City limits without regard to an individual's sex, race, religion, national origin, marital status, sexual orientation, color, age, disability or gender identity and to work to ensure the city's workforce is diverse and well trained.

Our new vision is to help create and sustain a city-wide culture that understands that diversity, equity, and inclusion are essential to the City's mission and strategic direction. And lastly, our core value is for each member of our team to approach our work with the heart of a public servant. We are dedicated to fostering an environment of transparency, equity, integrity and accountability.

The office continues to strive to resolve complaints within the ordinance goal of 100 days.

#### **Compliance Training:**

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COVID-19 changed how we delivered training last fiscal year and will continue into FY2020. Compliance was able to conduct New Employee Orientation via Zoom. Eight (8) sessions were conducted. Our office also created a new training that will be conducted quarterly, titled: "Fair Employment Practices 101 training for Managers and Supervisors." We have conducted one training that had fifteen (15) participants.

The Equal Opportunity Director shall make reports; including an annual report to the Charter Officers and the City Commission, as to the activities of the year and the need, if any, to revise equal opportunity ordinances, policies and programs.

In FY2019, the Office of Equity and Inclusion worked with the City Attorney's Office on adding two additional protections to the Fair Housing Ordinance, which included: lawful source of income and citizenship status. During this time, revisions were made to the ordinance to address a potential name change as well as revisions to clean up items that were redundant to the Charter. The ordinance was adopted in FY2020 and the office has taken in nine (9) complaints.

In FY2020, the Office of Equity and Inclusion has also worked with the City Attorney's Office on reviewing current EO policies and will be bringing several recommended changes to the City Commission. In FY2020, one (1) policy was brought forward with changes.

# The Equal Opportunity Director shall propose policies for the implementation of comprehensive equal opportunity and diversity programs and adherence to equal opportunity laws, policies, procedures, and related matters.

During FY2019, the City became members of GARE (Government Alliance on Race and Equity) and it was voted to make racial equity a priority within the City of Gainesville. Through this vote, the Office of Equity and Inclusion has been engaged and continues to engage with GARE on the needs of our organization. In conjunction with GARE, our office has scheduled racial equity training through August 2021. The training will include community builders at every level within the City.

In FY2019, our office established the City's first Equity Core Team. The team got off to a slow start in FY2020 due to COVID, but we were able to stand the Core Team up virtually and keep training. To date, there have been eight (8) two hour sessions with the Core Team. They are also scheduled for three (3) additional sessions and three (3) book group sessions. The Core Team is currently reading, "So You Want to Talk about Race?" by Ijeoma Oluo. The Core Team is scheduled to start GARE training in January 2021

During FY2020, the Office of Equity and Inclusion rolled out its annual diversity training online. In FY2020, the training was divided into supervisors and non-supervisors, as opposed to FY2019 training, which was the same training across the board. In FY2020, 96% of non-supervisors Among many other duties, the Office of Equity and Inclusion is responsible for the development, preparation and monitoring of the City's Affirmative Action Plan.

The office also houses the City's Small, Minority, Women and Veteran Business Program, which provides assistance in participating in the City's bid process as well as helping ensure bids are structured in a manner to maximize access to small, veteran and minority businesses without reducing the City's ability to acquire supplies and services at the best value for the price.

We also house the City's Diversity and Inclusion Program. This program oversees the annual compliance training, but also has the responsibility for overseeing Requests for Proposals (RFP's), Requests for Quotes (RFQ's), Invitations to Bid (ITB's) and all formal solicitations, prior to public release, among other functions.

Last, the Office of Equity and Inclusion has been tasked with creating an equity program for the City, which will be incorporated throughout the entire City, which will bring racial equity to our community members and neighbors. This will be achieved through many mediums, such as policies, procedures and practices.

It is also important to understand the professional standards in which our staff are required to conduct themselves under in the Office of Equity and Inclusion. In our roles, we are oftentimes handling information of a sensitive and sometimes, confidential nature. During our investigations, we at all times, are required to follow Florida Statutes with regards to the release of public records or the inspection of records. Additionally, we are required to use extreme discretion on who we share information with while investigations are open, in order to maintain the integrity of the investigation. It is important to understand that our office staff are neutral and they do not take any party's side during any investigation.

#### **ROLES OF THE EQUAL OPPORTUNITY DIRECTOR**

The Charter of the City of Gainesville describes the duties of the Equal Opportunity Director as the following:

#### **Compliance:**

The Equal Opportunity Director shall investigate complaints of discrimination, harassment, retaliation, and other related matters, and propose remedial action, as prescribed by the city's human relations and equal opportunity ordinances.

During FY2020, the office had 36 new intakes and closed 34 cases. Settlements increased this fiscal year from \$10,499.38 in FY2019 to \$16,828.48 in FY2020.

Backlog reduction continues to be a priority. The office hired a second Compliance Investigator in July 2020, to help with the increased caseloads and inquiries from the added changes of "Source of Income." Since the adding of the additional protections this summer, our office has taken on nine (9) source of income complaints. completed the training and 100% of supervisors completed the training. This is an increase from the 92% that were trained in FY2019.

# The Equal Opportunity Director shall develop, prepare, and monitor the city's affirmative action plan.

The Office of Equity and Inclusion develops and prepares an affirmative action plan biannually. The plan contains a set of specific results-oriented policies, practices and procedures, which are designed for achieving the fair utilization of women and minorities at all levels of the workforce where shortfalls may exist. In FY2019, the office opted to conduct an update to the plan and reviewed the workforce analysis information to check for accuracy. The audited was completed in FY2020, with several recommended changes. Unfortunately the recommended changes fall outside of the scope of the Office of Equity Inclusion and all into the Human Resources Department. Affirmative Action Plans are traditionally housed in Human Resources and the Office of Equity Inclusion would monitor for compliance. In agreeance with HR, our office has agreed to handle the plan that will be created for FY2021 and then move the plan to its proper department. Currently the AAP is being conducted by an outside vendor.

Shall monitor all hires, transfers, demotions, promotions, and terminations for compliance with equal opportunity laws, policies, procedures, guidelines, and related matters.

Reviewed new employment requisitions to ensure positions with affirmative action goals were properly identified.

Reviewed job descriptions to look for potential barriers that would narrow the pool of applicants.

Worked with departments on minimizing "special hiring preferences" in job advertisements to widen applicant pools.

# The Equal Opportunity Director shall develop instruments to monitor adherence to diversity and equal opportunity laws, policies, procedures, etc.

The Office of Equity and Inclusion disaggregated five (5) years of hiring data by race, year, department, GG and GRU to start to monitor for trends. The information was presented at a Race and Equity Subcommittee meeting. Additionally, information was disaggregated by race and department. After that meeting, five (5) year exit data was collected and is being disaggregated. This information is being used in our workforce equity conversations, which was an adopted goal in July 2020.

# The Equal Opportunity Director shall participate in the assessment and review of the city's employment practices, including recruitment, appointment, and promotion.

The City's affirmative action plan addresses the recruitment of women and minorities. The plan contains a set of specific results-oriented policies, practices and procedures, which are designed for achieving the fair utilization of women and minorities at all levels of the workforce where shortfalls may exist. In FY2020, workforce equity was adopted as a goal of the Office of Equity and Inclusion. Recruitment practices will be the first priority that is worked on.

# Shall compile various equal opportunity reports and related reports required of the city by state and federal agencies or that are necessary for compliance purposes.

The Office of Equity and Inclusion provided input and reviewed the bi-annual EEO Reports that RTS must submit to the Federal Transit Administration.

The Office of Equity and Inclusion is also filed the bi-annual EEO-4 Report with the Equal Employment Opportunity Commission, which identifies City employees by race, gender, salary and functional area, as required by the federal government.

The Office of Equity and Inclusion also completed a Utilization Report that was a Department of Justice requirement for GPD to receive federal grant funds.

#### **Other Accomplishments**

In FY2020, the Office of Equity and Inclusion had several online events which targeted different areas within the community.

#### Small Business Programs

In FY2019, the Office of Equity and Inclusion relaunched the Small Business Mentoring Program in April 2019. This program is designed to pair up a larger business with a smaller business, to help develop the business in areas it may need help in. The program had twenty six (26) businesses apply, eight (8) businesses commit to being mentors and seven (7) mentees. The relationships continued through FY2020 and the new application period launched for the program in FY2021.

The Office of Equity and Inclusion transitioned all small business outreach efforts to a virtual platform. A new series of workshops called "Small Business Power Hour," was created to give training to small businesses. The trainings were designed to be one hour, monthly on various topics. Each session attended had over 20 participants.

In FY2020, the office partnered with the Small Business Administration and hosted "A Day with the SBA," which gave information to small business owners about its programs and new programs that were specific to COVID.

In FY2020, the Office of Equity and Inclusion created a Small Business Newsletter that goes out to internally and externally. The newsletter gives, tips, tools and resources.

In FY2020, the Small Business department procured the services on Keen Consulting, to work on the RFP for the disparity study. In partnership with GG and GRU Procurement Offices, the office was able to collect all of the needed data for the RFP to go out to bid. Currently the RFP is with procurement.

#### **Equity Efforts**

Our office completed initial outreach meetings with 30 local community organizers, follow up meetings conducted as needed to connect neighbors with city staff and resources.

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The Office of Equity and Inclusion completed initial outreach and follow up meetings as needed with 4 charter officers, City Manager, Assistant City Managers, and 100% of department heads under the City Manager.

The Office had representation at UCG Racial Justice Committee Meetings.

Core Team Curriculum Development and Facilitation -4 unique two hour sessions written. 8 session facilitated to date (2 groups). Outline for 3 additional sessions and 3 session book group. Scheduled to complete by January 2021.

GCRA Equity Toolkit coaching and co-presenting at GCRA board meeting.

Equity Toolkit Updates, Toolkit Guide, accountability planning template and 3 Part workshop series.

#### Strategic Plan

The Office of Equity and Inclusion created a Strategic Plan for 2021, which captures the Citywide Strategic Plans Goals. This will be the roadmap for the Office of Equity and Inclusion for FY2021.

# SHALLEY



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#### **Commission Instructions:**

Evaluate the Charter Officer's performance for each area of accountability using the rating scale outlined below. Consider all criteria together when forming an impression about the Cha provide context to your rating or that would be helpful to the C

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2	Needs Improvement	Work performance on one or improvements to fully meet pe		than expected and requires some
1	Did Not Meet Expectations	Work performance within this expected performance standa		e. Performance did not meet

Ratings 2 or below should include comments and if applicable provide specific suggestions for performance improvement.

#### **Charter Officer Instructions and Next Steps:**

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- Human Resources will compile and aggregate all Charter Officer evaluation ratings, coordinate and present for discussion during a publicly noticed Commission meeting. Note: Salary increases are budgeted in a personal services contingency account and recommended salary increases will be processed within established payroll processing timelines.



Fiscal Year:	E	valuator	•			
Charter Officer:	T	itle:				
Goal(s) If needed use additional goals sheet						
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HR Form 01172019, Rev2020



Additional Goals Sheet

*Overall Support of City Commission Goals and O City's philosophy (vision, mission, values); actively pu how these relate to the Charter Officers' job and dep *Charter to attach Accomplishments Report for Eval Goal 2 - Describe Goal(s):	rsues an ur artment.	nderstandir	ites an und	erstanding zational go	of and supp als and obj	ports the ectives and
Commission Member: Check performance rating	1 🗆	2	3	4	5	N/A
Commission Member Comments:						
Charter Officer: Check self-evaluation rating	1	2	3	4	5	N/A
<u>Goal 3 - Describe Goal(s):</u>						
Commission Member: Check performance rating Commission Member Comments:	1	2	3	4	5	N/A
Charter Officer: Check self-evaluation rating Charter Officer Comments:	1	2	3	4	5	N/A

HR Form 01172019, Rev2020

5

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### Charter Officer Annual Performance Evaluation Form

#### Introduction:

The City Commission is responsible for conducting Charter Officer annual evaluations ensuring the Charter contributes to the achievement of the City's mission, vision and goals. Charter Officer performance evaluations shall be conducted after the conclusion of each fiscal year.

The purpose of the Charter Officer evaluation is to provide timely, clear and focused input to the Charter about how well he or she is performing in the key performance areas identified as most critical by the City Commission in achieving the City of Gainesville's strategic objectives.

The Charter Officer should be evaluated using criteria established by the Commission, aligning with established core competencies, review rating scale criteria and salary adjustment schedules as determined by Human Resources. Human Resources will notify the Commission at least one month in advance of performance evaluation due dates. Annual salary increases will be based on the Charter Officer's performance of established objectives in the prior fiscal year. Any annual awards are made based on market considerations and according to budgetary or fiscal constraints.

#### **Commission Instructions:**

Evaluate the Charter Officer's performance for each area of accountability using the rating scale outlined below. Consider all criteria together when forming an impression about the Charter Officer's performance. Add comments you believe provide context to your rating or that would be helpful to the Charter Officer.

		Performance Descriptors and Rating Scale
5	Superior	Work performance consistently exceeds all performance expectations and displays a consistent level of exceptional performance. This is consistent, exceptional performance.
4	Exemplary	Work performance consistently achieves all performance expectations and key elements of performance consistently are carried out in an exceptional manner or sustained periods. This is consistent, outstanding performance.
3	Meets Expectations	Work performance consistently achieves all performance expectations for this factor.
2	Needs Improvement	Work performance on one or more elements is less than expected and requires some improvements to fully meet performance standards.
1	Did Not Meet Expectations	Work performance within this factor is unacceptable. Performance did not meet expected performance standards.

Ratings 2 or below should include comments and if applicable provide specific suggestions for performance improvement.

#### **Charter Officer Instructions and Next Steps:**

- Using the above Rating Scale, the Charter Officer will self-evaluate and rate his or her performance. The Charter Officer should also attach his or her Accomplishments List or Report to the form.
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Fiscal Year: 2020	Evaluator: Adrian Hayes-Santos
Charter Officer: Nicolle Shalley	Title: Attorney
Goal(s): *Overall Support of City Commission Goals and Objective City's philosophy (vision, mission, values); actively pursues a how these relate to the Charter Officers' job and department *Charter to attach Accomplishments Report for Evaluation	n understanding of organizational goals and objectives and t.
Describe Goal(s): Discussed in meeting	
Commission Member: Circle performance rating 1	] 2⊠ 3⊡ 4⊡ 5⊡ N/A⊡
Commission Member Comments:	
Charter Officer: Circle self-evaluation rating 1	2 3 4 5 N/A
Charter Officer Comments: Competencies: Business Acumen. Understands the business, financial responsibility; realizes implications of key financial indic	status of the organization and core operational area of ators, and uses economic and industry data to accurately
diagnose business strengths and weaknesses.	
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Charter Officer: Check self-evaluation rating 1	] 2 3 4 5 N/A
Charter Officer Comments:	

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### **Charter Officer Annual Performance Evaluation Form**

2. Communication and Building Relationships. Com constructive feedback, promotes frank and open dis internal and external, promotes collaboration and re the City.	scussions or	n issues. Cu	ltivates a n	etwork of r	elationship	s both
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Charter Officer: Check self-evaluation rating	1□	2□	3□	4□	5 🗆	N/A□
Charter Officer Comments:						

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Commission Member Comments:						
Charter Officer: Check self-evaluation rating	1□	2□	3 🗆	4□	5 🗆	N/A□
Charter Officer Comments:						

4. Integrity. Demonstrates the highest level of inte				-	-	
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practices to appropriate leaders or authorities.						
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Charter Officer: Check self-evaluation rating	1□	2□	3□	4	5	N/A□
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Commission Member Comments: Charter Officer: Check self-evaluation rating	1	2	<b>3</b> □ Date:	4	5	N/A□

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Fiscal Year:		<b>Evaluator</b>	•			
Charter Officer:	T	itle:				
Goal(s) If needed use additional goals sheet	(page 5):	,				
*Overall Support of City Commission Goals and C City's philosophy (vision, mission, values); actively pu how these relate to the Charter Officers' job and dep *Charter to attach Accomplishments Report for Eval Describe Goal(s):	ursues an u partment.	nderstandir				
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#### **Commissioner Johnson Charter Officers Evaluation**

12/23/20

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This has been a challenging year. I appreciate the work of our charter officers to keep the city running. You all have adapted, pivoted when needed, and put the safety of our community builders and neighbors first. You all have done this through stressful events, sometimes with children at home and a host of other responsibilities. You have done this while keeping the goals of a very ambitious and very engaged commission at the forefront. This is not to be taken lightly, and in this regard, you all are s/heroes. Doing an evaluation during the best of times is challenging. In the middle of a global pandemic, it is more than challenging, to say the least. My personal challenge has been distinguishing between what is "normal" during this time, because there is no normal; and balancing my expectations from the beginning of the year until now. With the understanding that there are grey areas, nuance and involve over 2200 community builders that support your work, I offer some of my thoughts.

**Ed Bielarski** has done an effective job as the General Manager. He is knowledgeable in all aspects of the utility and does a good job building and motivating his team of over 1000 employees. Ed has an ability to consistently tell the Commission not what it wants to hear, but what it needs to hear. I believe that this leads to better decision making and a better understanding of the impacts of our decision on the utility. Mr. Bielarski is a big supporter of his team, it is my hope that this support does not lead to blind spots and/or disparate outcomes in the treatment of some employees.

As the newest member of the team, **Ginger Bigbie** has made admirable and quick work of staffing her office. During the time Auditor Bigbie has been with the city, there has been significant progress made on goals. There is also a clear path forward for the function of this office and a very clear willingness and ability to integrate the function of this office with the goals of the commission. I appreciate the non-linear thinking and ways to problem solve that have been exhibited by Ginger Bigbie.

Lee Feldman has done a fantastic job with the strategic action plan for the commission/organization and aligning it with specific projects and outcomes. The issuance of the new 2020 Pension Obligation Funds was an astute decision. Many other decisions made by the city manager are clearly rooted in decades of experience, experience that serves this city well. This experience is also why I am concerned about the level of professionalism the city manager has exhibited (as indicated in recent reports), when leading and working with community builders and charter officers. It is my expectation that a shift will occur in his leadership style, communication, and level of transparency. It is also my hope and expectation that the city manager will actively address cultural problems that have been exacerbated by recent events.

**Omichelle Gainey** has been reliable, consistent and highly effective in managing the roles and duties of her office. She has hired an amazing team that is also highly effective in their jobs. I appreciate the work that her office does that directly impacts the success of the commission, most notably, the policy research team. Clerk Gainey is always looking for ways to improve processes. In 2021, I look forward to progress that will be made as it relates to the board and committees. With an improved process and partnerships, I believe that we can have boards and committees that are reflective of our community.

**Teneeshia Marshall** has done a great job with the core functions of the Office of Equal Opportunity. Her strengths and abilities are in compliance, investigation and monitoring. As the transition from the Office of Equal Opportunity to the Office of Equity and Inclusion happens, with more responsibilities and an enhanced mission, I look forward to the following; a laser sharp focus on building out effective core equity teams throughout all of general government; a concerted effort to build a functioning racial equity task force; a useful racial equity toolkit and a process about when, where, how and by whom it should be used; and staff to be able to execute the goals as agreed upon by the commission. I believe that with consistent communication, imagination and working collaboratively with charter officers on the goals, we will get to a place we can all be proud of.

Through difficult to navigate situations, Mrs. Marshall has been professional and acted with integrity. Her prior experience in investigations as well as her character have served the city well.

**Nicolle Shalley** is highly ethical and able to provide a balanced view of issues. Although I have never fully understood the boundaries of what is permissible to expect from her office, she seems to do a good job at delegating and balancing the many issues that have a legal component. Providing updates to the commission on where projects are in the pipeline with her office has been helpful. I look forward to the following in 2021; processes put in place for stated goals to happen more expeditiously and/or an established timeline for high priority goals and ordinances; better communication and general assistance for simplistic questions and/or tasks.

As we continue the ambitious work of the city and commission in 2021, I hope that as a team, the charter officers will all assist in Goal 1 of the strategic plan- an equitable community. This aligns with a city racial equity policy and plan. I see this as a function of all of our charter officers working collaboratively and most importantly, a partnership between the office of equity and inclusion and the city manager's office. My hope for this city is a functioning, healthy city as measured by social determinants and a willingness to address poverty in our city. The opportunity gaps are growing with each day that passes, and I believe that the biggest challenges that lie ahead will be the negative outcomes associated with housing, health, education and our food system.

Thank you for all that you all do. None of it is easy, but I appreciate that you all keep on showing up. All of you have the hearts of public servants and want the best for Gainesville.

Sincerely,

**Commissioner Johnson** 



#### Introduction:

The City Commission is responsible for conducting Charter Officer annual evaluations ensuring the Charter contributes to the achievement of the City's mission, vision and goals. Charter Officer performance evaluations shall be conducted after the conclusion of each fiscal year.

The purpose of the Charter Officer evaluation is to provide timely, clear and focused input to the Charter about how well he or she is performing in the key performance areas identified as most critical by the City Commission in achieving the City of Gainesville's strategic objectives.

The Charter Officer should be evaluated using criteria established by the Commission, aligning with established core competencies, review rating scale criteria and salary adjustment schedules as determined by Human Resources. Human Resources will notify the Commission at least one month in advance of performance evaluation due dates. Annual salary increases will be based on the Charter Officer's performance of established objectives in the prior fiscal year. Any annual awards are made based on market considerations and according to budgetary or fiscal constraints.

#### **Commission Instructions:**

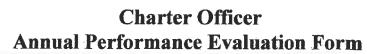
Evaluate the Charter Officer's performance for each area of accountability using the rating scale outlined below. Consider all criteria together when forming an impression about the Charter Officer's performance. Add comments you believe provide context to your rating or that would be helpful to the Charter Officer.

		Performance Descriptors and Rating Scale
5	Superior	Work performance consistently exceeds all performance expectations and displays a consistent level of exceptional performance. This is consistent, exceptional performance.
4	Exemplary	Work performance consistently achieves all performance expectations and key elements of performance consistently are carried out in an exceptional manner or sustained periods. This is consistent, outstanding performance.
3	Meets Expectations	Work performance consistently achieves all performance expectations for this factor.
2	Needs Improvement	Work performance on one or more elements is less than expected and requires some improvements to fully meet performance standards.
1	Did Not Meet Expectations	Work performance within this factor is unacceptable. Performance did not meet expected performance standards.

# Ratings 2 or below should include comments and if applicable provide specific suggestions for performance improvement.

#### **Charter Officer Instructions and Next Steps:**

- Using the above Rating Scale, the Charter Officer will self-evaluate and rate his or her performance. The Charter Officer should also attach his or her Accomplishments List or Report to the form.
- Charter Officer to submit completed self-evaluation and accomplishments report to Human Resources.
- Charter Officer to schedule individual evaluation discussion meetings with each Commission member to discuss selfevaluation and list of accomplishments. Charters should also be prepared to discuss objectives for next fiscal year.
- After reviewing the Charter Officer self-evaluation and accomplishments report with the Charter Officer, each Commission member will provide an evaluation rating, using the above Rating Scale.
- Following Commission and Charter performance evaluation discussion, completed performance evaluations are returned to Human Resources.
- Human Resources will compile and aggregate all Charter Officer evaluation ratings, coordinate and present for discussion during a publicly noticed Commission meeting. Note: Salary increases are budgeted in a personal services contingency account and recommended salary increases will be processed within established payroll processing timelines.



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Additional Goals Sheet

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Commission Member Comments:						
Charter Officer: Check self-evaluation rating	1	2□	3□	4	5	N/A
Charter Officer Comments:						

HR Form 01172019,Rev2020



### Charter Officer - Nicolle Shalley Annual Performance Evaluation Form

#### Introduction:

The City Commission is responsible for conducting Charter Officer annual evaluations ensuring the Charter contributes to the achievement of the City's mission, vision and goals. Charter Officer performance evaluations shall be conducted after the conclusion of each fiscal year.

The purpose of the Charter Officer evaluation is to provide timely, clear and focused input to the Charter about how well he or she is performing in the key performance areas identified as most critical by the City Commission in achieving the City of Gainesville's strategic objectives.

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#### **Commission Instructions:**

Evaluate the Charter Officer's performance for each area of accountability using the rating scale outlined below. Consider all criteria together when forming an impression about the Charter Officer's performance. Add comments you believe provide context to your rating or that would be helpful to the Charter Officer.

	Sector Date with	Performance Descriptors and Rating Scale
5	Superior	Work performance consistently exceeds all performance expectations and displays a consistent level of exceptional performance. This is consistent, exceptional performance.
4	Exemplary	Work performance consistently achieves all performance expectations and key elements of performance consistently are carried out in an exceptional manner or sustained periods. This is consistent, outstanding performance.
3	Meets Expectations	Work performance consistently achieves all performance expectations for this factor.
2	Needs Improvement	Work performance on one or more elements is less than expected and requires some improvements to fully meet performance standards.
1	Did Not Meet Expectations	Work performance within this factor is unacceptable. Performance did not meet expected performance standards.

# Ratings 2 or below should include comments and if applicable provide specific suggestions for performance improvement.

#### **Charter Officer Instructions and Next Steps:**

- Using the above Rating Scale, the Charter Officer will self-evaluate and rate his or her performance. The Charter Officer should also attach his or her Accomplishments List or Report to the form.
- Charter Officer to submit completed self-evaluation and accomplishments report to Human Resources.
- Charter Officer to schedule individual evaluation discussion meetings with each Commission member to discuss selfevaluation and list of accomplishments. Charters should also be prepared to discuss objectives for next fiscal year.
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- Human Resources will compile and aggregate all Charter Officer evaluation ratings, coordinate and present for discussion during a publicly noticed Commission meeting. Note: Salary increases are budgeted in a personal services contingency account and recommended salary increases will be processed within established payroll processing timelines.



### **Charter Officer -** Nicolle Shalley Annual Performance Evaluation Form

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	financial statu	us of the org	ganization a	and core op	erational ar	ea of
Charter Officer Comments: Dempetencies: Business Acumen. Understands the business, responsibility; realizes implications of key finar diagnose business strengths and weaknesses. Commission Member: Check competency rating	financial statu	us of the org	ganization a	and core op	erational ar	ea of
Charter Officer Comments: Dompetencies: Business Acumen. Understands the business, responsibility; realizes implications of key finar diagnose business strengths and weaknesses.	financial statu	us of the org	ganization a economic a	and core op	erational ar / data to aci	ea of curately
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# Charter Officer - Nicolle Shalley Annual Performance Evaluation Form

Commission Member: Check competency rating	10	2	3 🗆	4	5	N/A
Commission Member Comments: Very limited contr v/ (6.	et u/	p-stie/e	geformal.	Good	COlemony	ication
harter Officer: Check self-evaluation rating	10	2	3	4	5	N/A
harter Officer Comments:						
	et to provide	services at	a levél díře	cted by the	Commissi	on,
ensuring actions and decisions reflect an approp	et to provide riate level of 10	services at responsibi	a level diře lity for finar	cted by the Icial planni	ng and acc	ountability
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# Charter Officer - Nicolle Shalley Annual Performance Evaluation Form

ommission Member: Check competency rating	10	2	3	4	5	N/A
Commission Member Comments:			30			
Charter Officer: Check self-evaluation rating	1	2	3 🗆	4	5	N/A
Charter Officer Comments:						
high standards in meeting the vision, mission and	goals of the	e departme	nt.			
high standards in meeting the vision, mission and ommission Member: Check rating ommission Member Comments:	goals of the	e departme 2	nt. 3	4)X	5	N/A
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# Charter Officer - Nicolle Shalley Annual Performance Evaluation Form

#### Additional Goals Sheet

*Overall Support of City Commission Goals and C City's philosophy (vision, mission, values); actively pu how these relate to the Charter Officers' job and dep *Charter to attach Accomplishments Report for Eval Goal 2 - Describe Goal(s):	rsues an ur artment.	nderstandir	tes an und Ig of organi	erstanding zational go	of and sup als and obj	ports the ectives and
Commission Member: Check performance rating	1 🗆	2□	3□	4□	5	
Commission Member Comments:			50		3	N/A□
Charter Officer: Check self-evaluation rating	1	2□	3□	4	5	BI/A 📑
Charter Officer Comments:		Z	3	4	5	N/A
Goal 3 - Describe Goal(s):						
<b>Commission Member: Check performance rating</b> Commission Member Comments:	1 🗆	2□	3□	4	5	N/A
harter Officer: Check self-evaluation rating	1	2	3□	4	5	N/A 🗆
Charter Officer Comments:						



#### Introduction:

The City Commission is responsible for conducting Charter Officer annual evaluations ensuring the Charter contributes to the achievement of the City's mission, vision and goals. Charter Officer performance evaluations shall be conducted after the conclusion of each fiscal year.

The purpose of the Charter Officer evaluation is to provide timely, clear and focused input to the Charter about how well he or she is performing in the key performance areas identified as most critical by the City Commission in achieving the City of Gainesville's strategic objectives.

The Charter Officer should be evaluated using criteria established by the Commission, aligning with established core competencies, review rating scale criteria and salary adjustment schedules as determined by Human Resources. Human Resources will notify the Commission at least one month in advance of performance evaluation due dates. Annual salary increases will be based on the Charter Officer's performance of established objectives in the prior fiscal year. Any annual awards are made based on market considerations and according to budgetary or fiscal constraints.

#### **Commission Instructions:**

Evaluate the Charter Officer's performance for each area of accountability using the rating scale outlined below. Consider all criteria together when forming an impression about the Charter Officer's performance. Add comments you believe provide context to your rating or that would be helpful to the Charter Officer.

		Performance Descriptors and Rating Scale
5	Superior	Work performance consistently exceeds all performance expectations and displays a consistent level of exceptional performance. This is consistent, exceptional performance.
4	Exemplary	Work performance consistently achieves all performance expectations and key elements of performance consistently are carried out in an exceptional manner or sustained periods. This is consistent, outstanding performance.
3	Meets Expectations	Work performance consistently achieves all performance expectations for this factor.
2	Needs Improvement	Work performance on one or more elements is less than expected and requires some improvements to fully meet performance standards.
1	Did Not Meet Expectations	Work performance within this factor is unacceptable. Performance did not meet expected performance standards.

# Ratings 2 or below should include comments and if applicable provide specific suggestions for performance improvement.

#### **Charter Officer Instructions and Next Steps:**

- Using the above Rating Scale, the Charter Officer will self-evaluate and rate his or her performance. The Charter Officer should also attach his or her Accomplishments List or Report to the form.
- Charter Officer to submit completed self-evaluation and accomplishments report to Human Resources.
- Charter Officer to schedule individual evaluation discussion meetings with each Commission member to discuss selfevaluation and list of accomplishments. Charters should also be prepared to discuss objectives for next fiscal year.
- After reviewing the Charter Officer self-evaluation and accomplishments report with the Charter Officer, each Commission member will provide an evaluation rating, using the above Rating Scale.
- Following Commission and Charter performance evaluation discussion, completed performance evaluations are returned to Human Resources.
- Human Resources will compile and aggregate all Charter Officer evaluation ratings, coordinate and present for discussion during a publicly noticed Commission meeting. Note: Salary increases are budgeted in a personal services contingency account and recommended salary increases will be processed within established payroll processing timelines.



Fiscal Year: FY 202 0	<b>Evaluator:</b>	GiGi	5	mon	21
Charter Officer: Nicolle Shalley	Title: C	144	Asta	mens	
Goal(s) If needed use additional goals sheet (page	5);		24 1 10	They	
*Overall Support of City Commission Goals and Objecti City's philosophy (vision, mission, values); actively pursues a how these relate to the Charter Officers' job and departmer *Charter to attach Accomplishments Report for Evaluation Describe Goal(s):	ves. Demonstrate n understanding t.	es an unders of organiza	tional goal	f and supp Is and obje	orts the ctives and
Commission Member: Check performance rating 1		2	4	-	
Commission Member: Check performance rating 1 [ Commission Member Comments:	2	3	4	5	N/A
Charter Officer: Check self-evaluation rating 1	2	3□	4	5	N/A
Competencies: 1. Business Acumen. Understands the business, financial s responsibility; realizes implications of key financial indica diagnose business strengths and weaknesses.	tatus of the orga tors, and uses eq	nization and onomic and	l core oper	ational are lata to acc	a of urately
Commission Member: Check competency rating	2	3	4	50	
Commission Member Comments: MS. Shalley fully und it the attorny's off					N/A
Charter Officer: Check self-evaluation rating	2	3□	4□	5	N/A
Charter Officer Comments:				1	

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# **Charter Officer Annual Performance Evaluation Form**

the City. Commission Member: Check competency rating	10	2	30	4	5	N/A
Commission Member Comments: Commiate e. gneet job of p oper clis custions						C~
open discussions	on	issu	ez.	· •	oral	
Charter Officer: Check self-evaluation rating Charter Officer Comments:	1	20	3	4	5	N/A
• Fiscal Management. Prepares a balanced budg ensuring actions and decisions reflect an approp	et to provide priate level of	services at responsibi	a level dire ity for finar	cted by the cial planni	Commission of and account	on, puntabilitý.
• Fiscal Management. Prepares a balanced budg ensuring actions and decisions reflect an approp ommission Member: Check competency rating ommission Member Comments:	et to provide priate level of 1	services at responsibi 2	a level dire ity for finar 30	icial planni	Commissions and according and according and according to the second seco	on, puntability N/A 🗆
ensuring actions and decisions reflect an approp ommission Member: Check competency rating	oriate level of	responsibi	ity for finar	icial planni	ng and acco	puntability.
ensuring actions and decisions reflect an approp ommission Member: Check competency rating	1	responsibi	ity for finar	icial planni	ng and acco	puntability



Commission Member: Check competency rating	1	2	3	4	50	N/AL
Commission Member Comments:						
	NI	A				
harter Officer: Check self-evaluation rating	1	2□	3	4	5	N/A
charter Officer Comments:						
Leading and Supervision. Effectively establishes high standards in meeting the vision, mission and particular standards in meeting the vision, mission and particular standards in meeting the vision standards in meeting the vision and particular standards in meeting the vision standards in the vi	strategies t goals of the	o develop a departme	and maxim nt.	ize employ	ee perform	iance, fost
Leading and Supervision. Effectively establishes high standards in meeting the vision, mission and pommission Member: Check rating commission Member Comments:	strategies t goals of the	o develop a departmen 20	and maxim nt. 30	ize employ	ee perform	N/A
high standards in meeting the vision, mission and a <b>commission Member: Check rating</b> commission Member Comments:	goals of the	2 C	nt.	412	5	N/A
high standards in meeting the vision, mission and pommission Member: Check rating	goals of the	edepartmei	nt.			

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# **Charter Officer Annual Performance Evaluation Form**

Additional Goals Sheet

*Overall Support of City Commission Goals and O City's philosophy (vision, mission, values); actively pu how these relate to the Charter Officers' job and dep *Charter to attach Accomplishments Report for Eval Goal 2 - Describe Goal(s):	rsues an un artment. <b>uation Peri</b>	derstandin	tes an unde g of organi	erstanding zational go	of and sup als and obj	ports the ectives and
Commission Member: Check performance rating Commission Member Comments:	1 🗆	2	3 🗆	4	5 🗆	N/A
Charter Officer: Check self-evaluation rating	1	2 🗆	3 🗆	4	5	N/A
Charter Officer Comments:						
Goal 3 - Describe Goal(s):						1
Commission Member: Check performance rating	1 🗆	2	3	4	5	N/A

			4	5	
					N/A
			_		
1	2	3 🗌	4	5	N/A
	1	1 2	1 2 3	1 2 3 4	1 2 3 4 5

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#### Introduction:

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#### **Commission Instructions:**

Evaluate the Charter Officer's performance for each area of accountability using the rating scale outlined below. Consider all criteria together when forming an impression about the Charter Officer's performance. Add comments you believe provide context to your rating or that would be helpful to the Charter Officer.

5	Superior	Performance Descriptors and Rating Scale           Work performance consistently exceeds all performance expectations and displays a consistent level of exceptional performance. This is consistent, exceptional performance.
4	Exemplary	Work performance consistently achieves all performance expectations and key elements of performance consistently are carried out in an exceptional manner or sustained periods. This is consistent, outstanding performance.
3	Meets Expectations	Work performance consistently achieves all performance expectations for this factor.
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1	Did Not Meet Expectations	Work performance within this factor is unacceptable. Performance did not meet expected performance standards.

Ratings 2 or below should include comments and if applicable provide specific suggestions for performance improvement.

#### Charter Officer Instructions and Next Steps:

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- Following Commission and Charter performance evaluation discussion, completed performance evaluations are returned to Human Resources.
- Human Resources will compile and aggregate all Charter Officer evaluation ratings, coordinate and present for discussion during a publicity noticed Commission meeting. Note: Salary increases are budgeted in a personal services contingency account and recommended salary increases will be processed within established payroll processing timelines.



		Evaluator	r:			
Charter Officer: Nicolle Shalley	1	litle: Cit	y Attorn	ey		
Goal(s) If needed use additional goals shee	(page 5)	•			******	
*Overall Support of City Commission Goals and City's philosophy (vision, mission, values); actively p how these relate to the Charter Officers' job and de *Charter to attach Accomplishments Report for Ev	pursues an u epartment.	nderstandi	ates an unc ng of organ	lerstanding Izational go	of and sup vals and obj	ports the lectives and
Describe Goal(s): As stated in the attached Perform I have set for the Office of the City Attorney is to pre efficient and cost-effective manner, thereby assistin fruition, in running the business units, in achieving t claims and litigation on behalf of the City.	ovide timely ng and supp	, competer orting our C	nt and dilige Client in brin	ent legai cou nging projec	insel to our	r Client in a grams to
Commission Member: Check performance rating	10	20	30	427	e 🗖	D1/4
Commission Member Comments: $A (0000)$ Y out Office			30		5	N/A
harter Officer: Check self-evaluation rating charter Officer Comments: Throughout my 8+ years attorney), I work diligently to continuously stay info nd structure and manage the Office to be effective	rmed of the	City's ever	changing o	rganization	58 h the Office	N/AD e of the City
chieve its goais and objectives.	and efficien	t in support	ting and fui	thering our	Client's efi	i objectives forts to
chieve its goais and objectives.	and efficien	t in support	ting and fu	thering our	Client's efi	l objectives forts to
chieve its goais and objectives.		t in support		thering our	Client's efi	forts to
chieve its goals and objectives. <b>Dempetencies:</b> Business Acumen. Understands the business, fill responsibility; realizes implications of key finance	nancial stati	t in support	ganization	thering our	Client's efi	forts to
chieve its goals and objectives. Dempetencies: Butiness Acumen. Understands the business, fil responsibility; realizes implications of key finance diagnose business strengths and weaknesses. commission Member: Check competency rating	nancial stati	t in support	ganization	thering our	Client's efi	forts to
chieve its goals and objectives. <i>Impetencies:</i> Business Acumen. Understands the business, fir responsibility; realizes implications of key finance diagnose business strengths and weaknesses.	nancial stati Ial Indicator	t in support is of the on s, and uses	ganization economic :	thering our and core op and industry	Client's eff erational a / data to ac	forts to rea of curately
chieve its goals and objectives. mpetencies: Butiness Acumen. Understands the business, fil responsibility; realizes implications of key finance diagnose business strengths and weaknesses. commission Member: Check competency rating	nancial stati tal indicator	t in support is of the ori s, and uses 20	ganization economic: 30	and core op and indústry	Client's eff erational a / data to ac	forts to rea of curately N/A



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# Charter Officer Annual Performance Evaluation Form

the City.	10	2	30	4	525	N/A
ommission Member Comments:						
arter Officer: Check self-evaluation rating	10	20	30	4	523	N/AE
rvices.						
Fiscal Management. Prepares a balanced budg	get to provide	services at	a level dire	ected by th	<b>L</b> eonin St	on,
Fiscal Management. Prepares a balanced budg	pdate level o	responsibi	lity for fina	ncial plann	e Commissi ing and acc	on, ountability
Fiscal Management. Prepares a balanced budg	pdate level o	responsibi	lity for fina	ected by th ncial plann 4	e Commissi ing and acc SEK	on, ountability N/AD
Fiscal Management. Prepares a balanced budg ensuring actions and decisions reflect an appro mmission Member: Chack competency rating	<b>priate level</b> o	i responsibi	lity for fina	ncial plann	ing and acc	ountability
Fiscal Management. Prepares a balanced budg ensuring actions and decisions reflect an appro mmission Member: Chack competency rating	<b>priate level</b> o	i responsibi	lity for fina	ncial plann	ing and ac	

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					ports suspl	clous
Commission Member: Check competency rating	10	20	30	40	52	N/A
Commission Member Comments:						
harter Officer: Check self-evaluation rating harter Officer Comments: If there is one thing I hope	10	20	30	40	52	N/A
Ind professional Independence are critical to the proportion of th	rom our Off strategies t	ice. o develop a	nd maxim			
high standards in meeting the vision, mission and ommission Member: Check rating	10	2	ir.  3□	40	521	N/AC
195 the	nal Ma	a o	ou pla	iy hh	impa	taut
ommission Member Comments: As the the Institute Cole In the	Consi 6th	not law	ushe c	of the	6/savi	estron.
Parter Officer: Check self-evaluation rating narter Officer Comments: I believe the quality of the	10	20	30	42	5[]	N/A

Return fully completed Charter Officer Performance Evaluation form to Human Resources Director, Box 20

HR Form 01172019, Rev2020





Phone: 334-5011/Fax 334-2229

Bax 46

TO:	Mayor and City Commissioners	November 6, 2020
FROM:	Nicolle M. Shalley, City Attorney MM	
	FY19-20 Performance Report for the Office of t	torney

The following information is provided to assist you in evaluating my performance as City Attorney for the fiscal year period from October 1, 2019 to September 30, 2020. If you would like to discuss my performance prior to your public discussion of Charter Officer evaluations currently scheduled for a City Commission Special Meeting on December 9, 2020, please give me a call or schedule a meeting directly through Outlook, whenever I am available. In addition, at anytime throughout the year if you have questions regarding the work performance of this Office, I welcome your call or email. I look forward to another year of service as your City Attorney.

#### ROLE, RESPONSIBILITIES and PROFESSIONAL OBLIGATIONS OF THE OFFICE OF THE CITY ATTORNEY

To properly evaluate my performance, it is important to understand the role and responsibilities of the Office of the City Attorney. This Office serves as in-house corporate counsel to our sole client - the City of Gainesville, a municipal corporation comprised of two primary business units referred to as "General Government" and "Gainesville Regional Utilities."

This Office has an integral, but supporting, role in many of the functions and business activities of our client. I characterize it as a supporting role, not to minimize the importance or necessity of our services, but because it is not the function or role of this Office to set or implement policy, to administer and enforce the City Code, to make business decisions or manage City contracts. For the most part, this Office does not self-generate our workload. We are a service provider to our client with two primary roles, advisor and advocate.

It is also important to understand the professional obligations that govern our conduct as attorneys licensed by the Florida Bar. In particular, each attorney in this Office is personally responsible for observing the Rules of Professional Conduct and may be disciplined for failure to do so. The Rules of Professional Conduct require that, as advisor, we must exercise independent professional judgment and render candid advice to our client, and, as advocate, we cannot bring or defend a proceeding, or assert or controvert an issue therein, on behalf of our client, unless in our opinion there is a basis in law and fact for doing so.

#### **PRIMARY and CORE OBJECTIVES OF THE CITY ATTORNEY**

The primary objective I have set for this Office is to provide timely, competent and diligent legal counsel to our client in an efficient and cost-effective manner, thereby assisting and

supporting our client in bringing projects and programs to fruition, in running the business units they manage and in achieving their objectives and strategic initiatives and in defending and pursuing claims and litigation on behalf of the City. I review the performance of this Office in terms of the following core objectives:

Core Objective	Notable FY2019-2020 Achievements
How did we perform as advocate in all levels of court and administrative proceedings, including the preparation of documents and oral arguments before the judicial body? Did we work effectively with Risk Management and other departments to investigate and evaluate all claims as necessary to determine those that warrant settlement and those that should be litigated in the best interest of our client?	<ul> <li>Provided representation for our client in approximately 256 cases and claims, primarily these involve:</li> <li>Labor and employment issues;</li> <li>Personal injury and other torts;</li> <li>Police liability; and</li> <li>Construction and other contract disputes.</li> </ul>
How did we perform as <b>advisor in</b> <b>public meetings</b> held by our client? Did we provide meaningful responses to legal questions from our client, without disclosing attorney client privileged information or legal strategy? Were we adequately prepared to address the matters that were on the agenda?	Provided legal counsel at regular and special meetings and workshops held by the City Commission, Audit and Finance Committee, General Policy Committee, Digital Access Committee, City Charter Review Commission, Utility Advisory Board, Development Review Board, City Plan Board, Historic Preservation Board, Parking Board of Appeals, Canvassing Board, Human Rights Board, Tree Board of Appeals, Fire Safety Board of Adjustment, and Board of Trustees for the General Employees Pension Plan.
How did we perform as advisor in transactional and regulatory matters, including our availability for meetings with our client, responding to requests for legal guidance, review/preparation of contracts and other legal documents and preparation of ordinances?	Prepared and submitted 55 ordinances and reviewed numerous resolutions. Reviewed and/or drafted agreements and responded to requests for legal services and assisted our client with contract negotiations and resolution of disputes.
Did we clearly communicate our independent legal opinions and concisely frame legal issues to assist our client in evaluating particular courses of action and understanding the consequences of such action? Were our opinions based on current law and did we advise how changes in the law affect our client's business?	Provided legal opinions to staff, Charter Officers, City Boards and the City Commission on a wide variety of matters, including significant effort in following and advising on all matters related to the COVID-19 Pandemic. Conducted training and provided legal guidance on topics of interest, including: new Commissioner orientation; board trainings; GPD training; and advised city staff of changes in the law and developing court cases.

Did we provide legal services in a professional and ethical manner by practicing law in accordance with our Code of Professional Responsibility, the Code of Ethics for Public Officers and Employees, and the City's Personnel Policies and Procedures? Did we participate in educational events and associations to stay informed of developments in the law and maintain a network of professional relationships?	Five attorneys (including the City Attorney) maintained their Florida Bar Board Certification in City, County and Local Government Law. As such, we are recognized as "Specialists" or "Experts" in this area of law. Several attorneys serve as officers and leaders in local and state bar organizations and I serve on the Executive Board of the Florida Municipal Attorneys Association. Three legal assistants maintained professional legal assistant/paralegal certifications.
Did I provide proper management of the Office by operating within budget and by maintaining a professional staff (and retention of outside counsel) to provide legal services that meet the needs of our client?	Operated well within the budget approved by the Commission for this Office and was able to accommodate a City Management request to transfer a vacant FTE for their use. Retained and oversaw outside counsel to respond to excess workload demand and/or handle specialized matters for which we lack in-house expertise.

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