

BIELARSKI



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 self-evaluation 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 Annual Performance Evaluation Form

Fiscal Year: <u>FY20</u>	Evaluator: <u>DIA</u> Arreola
Charter Officer: <u>E. Biedarski</u>	Title: <u>GRU</u> <u>GM</u>

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):

Reliability, Sustainability, Safety

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

refer to mtg minutes

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Competencies:

1. Business Acumen. Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Consistent performance

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form

- 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 internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

Commission Member: Check competency rating 1 ☐ 2 ☐ 3 ☐ 4 ☒ 5 ☐ N/A ☐

Commission Member Comments:

Marked improvement for officer

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:

- 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 ☒ 5 ☐ N/A ☐

Commission Member Comments:

Consistent performance

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form

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 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☒ N/A ☐

Commission Member Comments:

Well done

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:

5. **Leading and Supervision.** Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☒ N/A ☐

Commission Member Comments:

Well done

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:

Charter Officer Signature: _____

Date: _____

Commission Member Signature: _____

Date: 12/14/2020

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



Charter Officer Annual Performance Evaluation Form

Additional Goals Sheet

***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**

Goal 2 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Goal 3 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

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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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Charter Officer Annual Performance Evaluation Form

Fiscal Year: 2020	Evaluator: Adrian Hayes-Santos
Charter Officer: Ed Bielarski	Title: GRU Manager

Goal(s):

***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): Discussed in meeting

Commission Member: Circle performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input checked="" type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Circle self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Competencies:

1. Business Acumen. Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Charter Officer Annual Performance Evaluation Form

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 internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input checked="" type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

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 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Charter Officer Annual Performance Evaluation Form

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	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

5. Leading and Supervision. Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Charter Officer Signature: _____

Date: _____

Commission Member Signature: Adrian Hayes-Santos

Date: 1/5/2021



Charter Officer Annual Performance Evaluation Form – Ed Bielarski

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Charter Officer Annual Performance Evaluation Form – Ed Bielarski

Fiscal Year: FY20	Evaluator: Johnson
Charter Officer:	Title: City Manager

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):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Competencies:

1. Business Acumen. Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form – Ed Bielarski

- 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 internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input checked="" type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

- 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 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form – Ed Bielarski

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	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input checked="" type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

5. **Leading and Supervision.** Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Charter Officer Signature: _____

Date: _____

Commission Member Signature: *Gen*

Date: 12/23/20

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

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.

Niccole 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 Annual Performance Evaluation Form

BIELARSKI, ED

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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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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 self-evaluation 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 Annual Performance Evaluation Form

Fiscal Year: 2020	Evaluator: POE
Charter Officer: General Manager	Title: Mayor

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):

1. Equitable Community
2. Sustainable Community
3. Great Place to Live & Experience
4. Resilient Local Economy
5. Best in Class Neighbor Services

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/> +	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

The GM has worked hard to position GRU as a 21st century utility that is able to accomplish the city's strategic goals. GRU contributes significantly to goals 2-5, and is working hard to be a part of the equity plan - rates continue to be a challenge, but progress has been made in this area.

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Competencies:

- 1. Business Acumen.** Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

The GM has made a series of recommendations, all adopted by the commission, that have significantly strengthened the utility's financial position.

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form

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 internal and external; promotes collaboration and removes barriers across organizational lines; builds credibility for the City.

Commission Member: Check competency rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

The GUM has improved the communication between the utility and other charter areas and there is ample opportunity to continue along this path.

Charter Officer: Check self-evaluation rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

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 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Please see comments under "Business Women."

Charter Officer: Check self-evaluation rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form

Additional Goals Sheet

***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**

Goal 2 - Describe Goal(s):

All (5) goals are the adopted goals of the city's strategic plan.

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:

Charter Officer: Check self-evaluation rating

1 ☐

2 ☐

3 ☐

4 ☐

5 ☐

N/A ☐

Charter Officer Comments:



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.

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 self-evaluation 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	Evaluator: Commissioner Reina Saco
Charter Officer: Ed Bielarski	Title: General Manager

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):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Good understanding of City needs and great covid management/ops.

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Competencies:

1. Business Acumen. Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer - Ed Bielarski Annual Performance Evaluation Form

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 internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

Commission Member: Check competency rating 1 ☐ 2 ☐ 3 ☐ 4 ☒ 5 ☐ N/A ☐

Commission Member Comments:

Made great efforts to communicate w/ public

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:

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 ☐ 5 ☒ N/A ☐

Commission Member Comments:

Understands restraints of budget process

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:



Charter Officer - Ed Bielarski Annual Performance Evaluation Form

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	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

5. Leading and Supervision. Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Charter Officer Signature: _____

Date: _____

Commission Member Signature: *[Signature]*

Date: 12/15/2020

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



Charter Officer - Ed Bielarski Annual Performance Evaluation Form

Additional Goals Sheet

***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**

Goal 2 - Describe Goal(s):

Lower or stabilize rates for customers

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Goal 3 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



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.
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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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- 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

Fiscal Year: FY2020	Evaluator: Gigi Simmons
Charter Officer: Ed Bielarski	Title: General Manager

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):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Due to Covid-19 some goals & objectives were difficult to achieve or complete. However this does NOT diminish the hard work & dedication put forth, thus far.

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Competencies:

1. **Business Acumen.** Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Ed displayed exceptional business acumen while navigating the utility during COVID.

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form

- 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 internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

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 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 ☐ 5 ☒ N/A ☐

Commission Member Comments:

Under difficult and challenging times - Ed and his staff managed the budget, provided exceptional service under insurmountable pressures.

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form

- 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 1 ☐ 2 ☐ 3 ☐ 4 ☒ 5 ☐ N/A ☐

Commission Member Comments:

N/A

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:

- 5. Leading and Supervision.** Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☒ N/A ☐

Commission Member Comments:

ed's leadership transcends throughout his organization

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:

Charter Officer Signature: _____

Date: _____

Commission Member Signature: Rigi Simms

Date: 12/15/20

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



Charter Officer Annual Performance Evaluation Form

Additional Goals Sheet

***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**

Goal 2 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Goal 3 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form

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.

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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Charter Officer Instructions and Next Steps:

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Charter Officer Annual Performance Evaluation Form

Fiscal Year: FY 2020	Evaluator: Ward
Charter Officer: EDWARD BIELARSKI	Title:

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):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Competencies:

1: Business Acumen. Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments: I AM INCREDIBLY AWARE OF THE BUSINESS, FINANCIAL & OPERATIONAL AREA'S OF GRU AND HOW TO IMPROVE THEM. MY TENURE HAS RESULTED IN REVERSING THE COURSE OF A HOST OF BAD BUSINESS DECISIONS AND PLACING GRU ON A COURSE OF SOLID FINANCIAL/OPERATIONAL MANAGEMENT (SEE FY 20 ACCOMPLISHMENTS)



Charter Officer Annual Performance Evaluation Form

- 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 internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

Commission Member: Check competency rating 1 ☐ 2 ☐ 3 ☐ 4 ☒ 5 ☐ N/A ☐

Commission Member Comments:

I continue to hope for more public engagement/ external communications about the excellence that GRU provides.

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☒ N/A ☐

Charter Officer Comments: HAVE FOSTERED WORKING RELATIONSHIPS ACROSS CITY GOVERNMENT AND BETWEEN CHARTER OFFICERS WHICH HAS PROMOTED OPEN & HONEST DIALOGUES TO PROVIDE ADHERENCE TO STRATEGIC VISION OF CITY. FRANKLY, I DON'T BELIEVE THERE HAS BEEN A TIME WHEN GRU WORKED WITH CG 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.

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: IN SPITE OF THE CONSTRAINTS OF COVID, SHRINKING MARGINS, ADDITIONAL COSTS OF TOTAL REWARDS AND THE LOSS OF REVENUES AS SEEN THRU OUT THE UTILITY INDUSTRY, GRU HAS BEEN ABLE TO PROVIDE THE SERVICES REQUIRED IN A FINANCIALLY PRUDENT MANNER.



Charter Officer Annual Performance Evaluation Form

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 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: I HAVE PROVEN THRU MY ACTIONS TO TAKE MY ROLE AS A CHARTER OFFICER QUITE SERIOUSLY AND AS SUCH DEMONSTRATE ON A DAILY BASIS THE HIGHEST OF INTEGRITY AND ETHICAL BEHAVIOR.

5. Leading and Supervision. Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check 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: THE PERFORMANCE OF GRU OVER MY TENURE HAS BEEN MARKED BY MY EFFORTS TO MAXIMIZE EMPLOYEE PERFORMANCE AND SETTING HIGH STANDARDS. THIS EFFORT HAS RESULTED IN GRU'S FIRST COMMERCIAL GRADE SOLAR PPA, ANOTHER REDUCTION IN CO₂ WITH A PLAN TO MAKE DH2 A DUAL FUEL PLANT & HISTORIC RESTRUCTURING OF DEBT IN 2020.

Charter Officer Signature: _____

Date: _____

Commission Member Signature: _____

Date: _____

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



Charter Officer Annual Performance Evaluation Form

Additional Goals Sheet

***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**

Goal 2 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
---	----------------------------	----------------------------	----------------------------	----------------------------	----------------------------	------------------------------

Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Goal 3 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

BIGBIE



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 self-evaluation 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 Annual Performance Evaluation Form

Fiscal Year: <u>FY20</u>	Evaluator: <u>DIA</u> Arreola
Charter Officer: <u>L. Bibbie</u>	Title: <u>City Auditor</u>

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):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Truly a goal setter and focused.

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Competencies:

- 1. Business Acumen.** Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Consistent performance

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form

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 internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

Commission Member: Check competency rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

~~Excellent~~
Excellent Communication

Charter Officer: Check self-evaluation rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

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 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Consistent performance with office budget

Charter Officer: Check self-evaluation rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form

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 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☒ N/A ☐

Commission Member Comments:

Well done.

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:

5. **Leading and Supervision.** Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☒ N/A ☐

Commission Member Comments:

Well done

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:

Charter Officer Signature: _____

Date: _____

Commission Member Signature: _____

Date: 12/14/2020

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



Charter Officer Annual Performance Evaluation Form

Additional Goals Sheet

***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**

Goal 2 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Goal 3 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

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 self-evaluation 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 Annual Performance Evaluation Form

Fiscal Year: 2020	Evaluator: Adrian Hayes-Santos
Charter Officer: Ginger Bigbie	Title: Auditor

Goal(s):

***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): Discussed in meeting

Commission Member: Circle performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Circle self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Competencies:

1. Business Acumen. Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Charter Officer Annual Performance Evaluation Form

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 internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

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 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Charter Officer Annual Performance Evaluation Form

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	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

5. Leading and Supervision. Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Charter Officer Signature: _____

Date: _____

Commission Member Signature: Adrian Hayes-Santos

Date: 1/5/2021



Charter Officer Annual Performance Evaluation Form – Ginger 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.

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 self-evaluation 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 Annual Performance Evaluation Form – Ginger Bigbie

Fiscal Year: FY20	Evaluator: Johnson
Charter Officer:	Title:

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):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Competencies:

1. Business Acumen. Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form – Ginger Bigbie

- 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 internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

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 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 ☒ 5 ☐ N/A ☐

Commission Member Comments:

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form – Ginger Bigbie

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	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

5. **Leading and Supervision.** Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Charter Officer Signature: _____

Date: _____

Commission Member Signature: *[Signature]*

Date: 12/23/20

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

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 Annual Performance Evaluation Form

BIGBIE, GINGER

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 self-evaluation 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 Annual Performance Evaluation Form

Fiscal Year: 2020	Evaluator: ROE
Charter Officer: Auditor	Title: Mayor

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):

1. Equitable Community
2. Sustainable Community
3. Great place to Live & Experience
4. Resilient Local Economy
5. Best in Class City/County Services

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

The auditor has added great value to the city in her short time here. She understands how the various parts of the organization inter-sect to accomplish the strategic goals.

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Competencies:

1. **Business Acumen.** Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

The auditor has shown to be quite valuable in her understanding the risk-side of all business decisions across the organization. She uses her internal audit function to great effect as well as help coordinate our external audit needs.

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form

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 internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

Commission Member: Check competency rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☒ N/A ☐

Commission Member Comments:

The auditor has shown herself to be a bridge between charter officers, has communicated well with me on a variety of issues, and has worked well with external audit functions.

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:

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 ☐ 5 ☒ N/A ☐

Commission Member Comments:

The auditor has done an exemplary job at identifying risk and working with management to mitigate said risk.

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form

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 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☒ N/A ☐

Commission Member Comments:

the auditor holds herself and her department to the highest standards.

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:

5. Leading and Supervision. Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☒ N/A ☐

Commission Member Comments:

The auditor has worked hard to fully staff her department and has developed a plan to close all part-time issues by March of 2021.

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:

Charter Officer Signature: _____

Date: _____

Commission Member Signature: *JR*

Date: *12/18/20*

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



Charter Officer Annual Performance Evaluation Form

Additional Goals Sheet

***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**

Goal 2 - Describe Goal(s):

All goals are the (5) goals adopted in our Strategic Plan.

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Goal 3 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer - Ginger Bigbie 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 self-evaluation and list of accomplishments. Charters should also be prepared to discuss objectives for next fiscal year.
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- Following Commission and Charter performance evaluation discussion, completed performance evaluations are returned to Human Resources.
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Charter Officer - Ginger Bigbie Annual Performance Evaluation Form

Fiscal Year: FY20	Evaluator: Commissioner Reina Saco
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):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

set and met goals in timely manner.

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Competencies:

1. Business Acumen. Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer - Ginger Bigbie Annual Performance Evaluation Form

- 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 internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

- 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 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer - Ginger Bigbie Annual Performance Evaluation Form

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 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:

5. **Leading and Supervision.** Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☒ N/A ☐

Commission Member Comments:

Recruited and maintained diverse team

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:

Charter Officer Signature: _____

Date: _____

Commission Member Signature: *[Signature]* _____

Date: *12/15/2020* _____

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



Charter Officer - Ginger Bigbie Annual Performance Evaluation Form

Additional Goals Sheet

***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**

Goal 2 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Goal 3 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form

Introduction:

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Commission Instructions:

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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.



Charter Officer Annual Performance Evaluation Form

Fiscal Year: <u>FY2020</u>	Evaluator: <u>Gibi Simmons</u>
Charter Officer: <u>Ginger Bigbie</u>	Title: <u>City Auditor</u>

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):

Due

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Due to Covid-19 many goals and objectives were unable to be completed. However, this does not diminish your hard work in any way.

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Competencies:

1. Business Acumen. Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Please see Charter officer's self-evaluating rating & comments.

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form

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 internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

Commission Member: Check competency rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

MS. Bighie seems to be engaged & communicates across the organization, not only with her staff but other Charters and Commissioners as well.

Charter Officer: Check self-evaluation rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

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 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Please see charter officers self-examining comments.

Charter Officer: Check self-evaluation rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form

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 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☒ N/A ☐

Commission Member Comments:

please see Charter officers' self-evaluating comments.

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:

5. **Leading and Supervision.** Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check rating 1 ☐ 2 ☐ 3 ☐ 4 ☒ 5 ☐ N/A ☐

Commission Member Comments:

please see Charter officers' self-evaluating ranking and comments.

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:

Charter Officer Signature: _____

Date: _____

Commission Member Signature: *Digi Simon*

Date: *12/15/28*

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



Charter Officer Annual Performance Evaluation Form

Additional Goals Sheet

***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**

Goal 2 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Goal 3 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



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 self-evaluation 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 Annual Performance Evaluation Form

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 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Annual Performance Evaluation Form

Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Please see attached "Activities and Accomplishments" for documentation of the City Auditor's 4 goals.

Competencies:

1. Business Acumen. Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

I draw on experience, process understanding, and problem solving in a variety of complex organizations and local government to understand new processes and related risk exposures, to identify and prioritize process improvement for best value-add improvements. My team and I will continue to build subject matter expertise in all public utilities operations.

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 internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Annual Performance Evaluation Form

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 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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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 subject 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.



Charter Officer Annual Performance Evaluation Form

- 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	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Demonstrating the highest ethical standards, policy compliance, and core values is essential for our internal audit function. We manage the fraud hotline and ensure City staff and neighbors can have confidence in the process.

- 5. Leading and Supervision.** Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

I have introduced considerable process improvements for conducting more streamlined and value-added internal audit engagements, and ensuring audit issues are sufficiently remediated. Process improvement required leveraging diverse strengths across the team to pitch in hard work and ideas for the betterment of the Office and the organization. Change is difficult, but when staff understand the department goals and work for the same results, working through process change is rewarding. High quality work and relationship building align under effective coaching and leadership.

Charter Officer Signature: Ginger Biglie

Date: 11/16/2020

Commission Member Signature: [Signature]

Date: 12/22/20

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

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 full-time 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 re-prioritize engagements on the audit plan due to emerging risks. As engagements are completed during the year, new engagements from the prioritized 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



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 self-evaluation 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 Annual Performance Evaluation Form

Fiscal Year: <u>FY20</u>	Evaluator: <u>DIA</u> Arreola
Charter Officer: <u>L. Feldman</u>	Title: <u>CM</u>

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): Refer to strategic planning docs

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Organized and results focused.

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Competencies:

1. **Business Acumen.** Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Consistent performance.

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form

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 internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

Commission Member: Check competency rating 1 ☒ ~~1~~ ~~4~~ 2 ☒ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Commission Member Comments:

Credible communication lacks and has broken down.

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:

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 ☒ 5 ☐ N/A ☐

Commission Member Comments:

Consistent performance if not altogether well delayed.

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form

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 1 ☒ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Commission Member Comments:

Officer violated federal law protecting employees from retaliatory action. Resignation has been requested.

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:

5. **Leading and Supervision.** Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check rating 1 ☒ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Commission Member Comments:

Investigation into aforementioned retaliation reveals unacceptable conduct in official capacity.

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:

Charter Officer Signature: _____

Date: _____

Commission Member Signature: Don Acker

Date: 12/14/2020

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



Charter Officer Annual Performance Evaluation Form

Additional Goals Sheet

***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**

Goal 2 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Goal 3 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

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 self-evaluation 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 Annual Performance Evaluation Form

Fiscal Year: 2020	Evaluator: Adrian Hayes-Santos
Charter Officer: Lee Feldman	Title: City Manager

Goal(s):

***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): Discussed in meeting

Commission Member: Circle performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Circle self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Competencies:

1. Business Acumen. Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
---	----------------------------	----------------------------	----------------------------	----------------------------	---------------------------------------	------------------------------

Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Charter Officer Annual Performance Evaluation Form

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 internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input checked="" type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

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 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Charter Officer Annual Performance Evaluation Form

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	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

5. Leading and Supervision. Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Charter Officer Signature: _____

Date: _____

Commission Member Signature: Adrian Hayes-Santos

Date: 1/5/2021



Charter Officer Annual Performance Evaluation Form – Lee 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.

Performance Descriptors and Rating Scale		
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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 – Lee Feldman

Fiscal Year: FY20	Evaluator: Johnson
Charter Officer:	Title:

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):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Competencies:

1. Business Acumen. Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form – Lee Feldman

- 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 internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

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 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 ☒ 5 ☐ N/A ☐

Commission Member Comments:

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form – Lee Feldman

- 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	1 <input checked="" type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

- 5. Leading and Supervision.** Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input checked="" type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Charter Officer Signature: _____

Date: _____

Commission Member Signature: Lee Feldman

Date: 12/23/20

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

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.

Omicelle 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.

Niccole 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 Annual Performance Evaluation Form

FELDMAN, LEE

Introduction:

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Commission Instructions:

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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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Charter Officer Instructions and Next Steps:

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Charter Officer Annual Performance Evaluation Form

Fiscal Year: 2020	Evaluator: POE
Charter Officer: City Manager	Title: Mayor

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):

1. Equitable Community
2. Sustainable Community
3. Great Place to Live & Experience
4. Resilient Local Economy
5. Best in Class Neighbor Services

Commission Member: Check performance rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

The CM is more focused and driven on advancing the City Commission's adopted strategic plan than any charter officer I have worked with. The CM is that he is responsible for implementing the Commission's vision and has to experience to do so.

Charter Officer: Check self-evaluation rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Competencies:

1. **Business Acumen.** Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

The CM is highly adept at understanding the complexities of the city's budget. He has already made significant changes that have saved money, created greater efficiency, and increased our reserves.

Charter Officer: Check self-evaluation rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form

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 internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

Commission Member: Check competency rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input checked="" type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

The CM needs some improvement in this area, while I do see the CM being very direct with his staff, he does lack a diplomatic touch at times. I see that he has wanted to improve on this, and I expect that progress to continue.

Charter Officer: Check self-evaluation rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

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 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

The CM is highly capable at fiscal management of the organization - one of his greatest strengths.

Charter Officer: Check self-evaluation rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form

Additional Goals Sheet

***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**

Goal 2 - Describe Goal(s):

See (5) goals from the Commission's adopted Strategic Plan

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Goal 3 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer - Lee Feldman Annual Performance Evaluation Form

Introduction:

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- Charter Officer to schedule individual evaluation discussion meetings with each Commission member to discuss self-evaluation 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 - Lee Feldman Annual Performance Evaluation Form

Fiscal Year: FY20	Evaluator: Commissioner Reina Saco
Charter Officer: Lee Feldman	Title: City Manager

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):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

- Worked within difficult situations
- Demonstrated professionalism and leadership

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Competencies:

- 1. Business Acumen.** Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer - Lee Feldman Annual Performance Evaluation Form

- 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 internal and external; promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

Commission Member: Check competency rating 1 ☐ 2 ☐ 3 ☐ 4 ☒ 5 ☐ N/A ☐

Commission Member Comments:

Approved purchase/implementation of language services to facilitate open communication w/ neighbors.

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:

- 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 ☒ 5 ☐ N/A ☐

Commission Member Comments:

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:



Charter Officer - Lee Feldman Annual Performance Evaluation Form

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 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:

5. Leading and Supervision. Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check rating 1 ☐ 2 ☐ 3 ☐ 4 ☒ 5 ☒ N/A ☐

Commission Member Comments:

rearranged depts to be more efficient

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:

Charter Officer Signature: _____

Date: _____

Commission Member Signature: *[Signature]*

Date: *12/18/2020*

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



Charter Officer - Lee Feldman Annual Performance Evaluation Form

Additional Goals Sheet

***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**

Goal 2 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Goal 3 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



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 self-evaluation 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 Annual Performance Evaluation Form

Fiscal Year: FY2020	Evaluator: Gigi Simmons
Charter Officer: Lee Feldman	Title: City Manager

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):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input checked="" type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Due to COVID-19 some goals & objectives were difficult to achieve or complete. However, this does not diminish or take away from the task of addressing the impact of COVID as it impacts the organizational goals & objectives.

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Competencies:

1. Business Acumen. Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Mr. Feldman fully understands the organization's financial status and operational area of responsibilities.

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form

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 internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

Commission Member: Check competency rating 1 ☐ 2 ☒ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Commission Member Comments:

Need to work to improve internal and external communication and work towards removing any and all barriers across the organization.

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:

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 ☒ 5 ☐ N/A ☐

Commission Member Comments:

Mr. Feldman managed a balanced budget under unforeseen circumstances due to COVID 19

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form

- 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 1 ☒ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Commission Member Comments:

*complaints +
Due to multiple law-suits which has put the
City in an unflattering light and questions the
organization (city) codes of conduct and values, this
is why I ranked as such.*

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:

- 5. Leading and Supervision.** Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check rating 1 ☐ 2 ☒ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Commission Member Comments:

*Leading + Supervising are two different things. Mr.
Feldman's leadership skills need improvement, His
strategies may not be well suited for his leadership
style.*

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:

Charter Officer Signature: _____

Date: _____

Commission Member Signature: *Ligi Simms*

Date: *12/15/20*

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



Charter Officer Annual Performance Evaluation Form

Additional Goals Sheet

***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**

Goal 2 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Goal 3 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form

Fiscal Year: FY20	Evaluator: Self Ward
Charter Officer: City Manager	Title:

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): Equitable Community (1) Enhance the access to City services, information, programs, facilities and activity for all Neighbors (2) Expand the multi-lingual capacity of Community Builders enhancing services to our diverse Neighbors (3) Reduce the neighborhoods that are food deserts with all Neighbors having convenient access to quality foods (4) Develop City equity tool (5) Have a City workforce that is racially and culturally diverse in all City departments and at all organization levels reflecting community demographics, at a minimum (6) Have equitable access for all Neighbors to healthcare and other neighborhood services

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments: See City Manager Memorandum No. 200054 dated October 30, 2020. I recognize that there is much work to be done here and will continue to work with the other Charter Officers to make progress on these objectives.

Competencies:

1. Business Acumen. Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments: See City Manager Memorandum No. 200054 dated October 30, 2020.



Charter Officer Annual Performance Evaluation Form

- 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 internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

Commission Member: Check competency rating 1 ☐ 2 ☐ 3 ☒ 4 ☐ 5 ☐ N/A ☐

Commission Member Comments:

We need to see work on building relationships between CM & existing senior management & other Charter Officers.

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☒ 5 ☐ N/A ☐

Charter Officer Comments: See City Manager Memorandum No. 200054 dated October 30, 2020. Lack of public meetings has limited my ability to engage with community builders and neighbors during the fiscal year.

- 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 ☐ 5 ☒ N/A ☐

Commission Member Comments:

Very pleased with the fiscal situation you provide.

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☒ N/A ☐

Charter Officer Comments: See City Manager Memorandum No. 200054 dated October 30, 2020. Arriving in the middle of a 2-year budget did not allow for full analysis of the budgetary process. FY 21 will provide an opportunity to address capital planning and use of capital debt proceeds to meet the Commission's goals.



Charter Officer Annual Performance Evaluation Form

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 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: See City Manager Memorandum No. 200054 dated October 30, 2020.

5. **Leading and Supervision.** Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

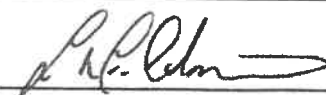
Commission Member: Check rating 1 ☐ 2 ☐ 3 ☐ 4 ☒ 5 ☐ N/A ☐

Commission Member Comments:

As in two, we need to work on internal relationship building.

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☒ N/A ☐

Charter Officer Comments: See City Manager Memorandum No. 200054 dated October 30, 2020.

Charter Officer Signature: 

Date: 11/13/20

Commission Member Signature: 

Date: 12/22/20

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



Charter Officer Annual Performance Evaluation Form

Additional Goals Sheet

***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**

Goal 2 - Describe Goal(s): Sustainable Community (1) Increase the acreage of natural/conservation lands (2) Increase the City's use of renewable resources with the goal of 100% by 2045 or sooner (3) Have more neighborhoods on City sewer system, less number of failing septic systems (4) Enhance well-designed water, wastewater and electric systems operating in an environmentally responsible manner (5) Pursue zero waste goal (6) Reduce the City organization's carbon footprint by 25% to achieve the climate change goal

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments: See City Manager Memorandum No. 200054 dated October 30, 2020. In FY21 a baseline will be established to measure General Government's performance under this goal.

Goal 3 - Describe Goal(s): A Great Place to Live and Experience (1) Increase the affordable housing opportunities [ownership and rental] for all Neighbors and throughout the Gainesville community (2) Develop a vibrant, alive Downtown with expanded residential and commercial opportunities (3) Revitalize eastside neighborhoods with expanded and upgraded housing, well maintained and upgraded City infrastructure and more neighborhood businesses serving the daily needs of Neighbors (4) Have medical and healthcare services available in all neighborhoods and access for all Neighbors, focusing on the eastside (5) Provide an affordable or free transit service with fixed routes and on-demand services accessible for all (6) Eliminate chronic homelessness and reduce transitional homelessness by 50%(point of time)

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments: See City Manager Memorandum No. 200054 dated October 30, 2020. Many projects have been initiated for General Government to address these objectives. In addition FY21 will see a streamlined approach to Neighborhood Enhancement (f/k/a Codes or Code enforcement).



Charter Officer Annual Performance Evaluation Form

Additional Goals Sheet

***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**

Goal 4 - Describe Goal(s): Resilient Local Economy (1) Increase the number of successful and sustainable, small and locally owned businesses by % with ownership reflecting neighbors (2) Reduce the poverty level in the Gainesville community by 25% ranking with major university communities (3) Have the technology infrastructure/community broadband that is fast, reliable and affordable to support businesses and home offices (working from home) (4) Have a diverse local economy (industrial and business) insulated from economic trends (5) Attract new businesses to Gainesville consistent with our economic vision and "targeted" businesses (6) Develop a successful Minority/Women-owned Business Enterprise (MWBE) program that is producing results for Neighbors

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments: See City Manager Memorandum No. 200054 dated October 30, 2020. The GNVcares for Business program demonstrates my commitment to assisting local businesses. FY21 will see a strong emphasis in General Government to buy local.

Goal 5 - Describe Goal(s): "Best in Class" Neighbor Services (1) Maintain, hire, train and retain professional Community Builders dedicated to serving the Gainesville community (2) Develop a City organization culture that emphasizes professionalism, service, teamwork, results and performance accountability (3) Have all City departments working together without silos (4) Develop and enhance proactive City communications policies, strategies and tools to inform the community (5) Have a high level of Neighbor satisfaction with City services and services response (6) Upgrade information technology systems -hardware and software -to better serve Neighbors (7) Develop effective and usable performance metrics for evaluating the service performance and the value to Neighbors

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments: See City Manager Memorandum No. 200054 dated October 30, 2020.



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 *Lee R. Feldman*
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.
 - 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.
 - Retimed 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 funding 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 Annual Performance Evaluation Form

Fiscal Year: <u>FY20</u>	Evaluator: <u>DIA</u> Arreola
Charter Officer: <u>D. Gailney</u>	Title: <u>City clerk</u>

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):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Supportive and focused to the benefit of the City Commission

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Competencies:

1. **Business Acumen.** Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Consistent performance.

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form

- 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 internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

Commission Member: Check competency rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Well done,

Charter Officer: Check self-evaluation rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

- 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 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Small office budget, but performs well.

Charter Officer: Check self-evaluation rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form

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 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☒ N/A ☐

Commission Member Comments:

Well done.

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:

5. **Leading and Supervision.** Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☒ N/A ☐

Commission Member Comments:

Growth is demonstrable.

Well done.

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:

Charter Officer Signature: _____

Date: _____

Commission Member Signature: 

Date: 12/14/2020

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



Charter Officer Annual Performance Evaluation Form

Additional Goals Sheet

***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**

Goal 2 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Goal 3 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

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 self-evaluation 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 Annual Performance Evaluation Form

Fiscal Year: 2020	Evaluator: Adrian Hayes-Santos
Charter Officer: Omichele Gainey	Title: Clerk

Goal(s):

***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): Discussed in meeting

Commission Member: Circle performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input checked="" type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Circle self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Competencies:

1. Business Acumen. Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input checked="" type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Charter Officer Annual Performance Evaluation Form

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 internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input checked="" type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

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 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Charter Officer Annual Performance Evaluation Form

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	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

5. Leading and Supervision. Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check rating	1 <input type="checkbox"/>	2 <input checked="" type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Charter Officer Signature: _____

Date: _____

Commission Member Signature: Adrian Hayes-Santos

Date: 1/5/2021



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.

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 self-evaluation 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 Annual Performance Evaluation Form – Omichele Gainey

Fiscal Year: FY20	Evaluator: Johnson
Charter Officer:	Title:

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):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Competencies:

1. Business Acumen. Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form – Omichele Gainey

- 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 internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

- 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 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input checked="" type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form – Omichele Gainey

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	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

5. **Leading and Supervision.** Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Charter Officer Signature: _____

Date: _____

Commission Member Signature: Gainey

Date: 12/23/20

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

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.

Omicelle 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.

Niccole 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 Annual Performance Evaluation Form

GAINEY, OMICHELE

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 self-evaluation 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 Annual Performance Evaluation Form

Fiscal Year: 2020	Evaluator: POE
Charter Officer: City Clerk	Title: Mayor

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):

1. Equitable Community
2. Sustainable Community
3. Great Place to Live & Experience
4. Resilient Local Economy
5. Best In Class Neighbor Services

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

The City Clerk has worked hard to bring greater access to our records and meetings to our neighbors. Her role in transforming our meetings to a virtual environment during COVID-19 has been exceptional.

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Competencies:

1. **Business Acumen:** Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input checked="" type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

The clerk meets all expectations in this area, even if this is not the primary or even secondary role of the clerk. I see no need for any significant change in this area.

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form

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 internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

Commission Member: Check competency rating 1 ☐ 2 ☐ 3 ☐ 4 ☒ + 5 ☐ N/A ☐

Commission Member Comments:

The clerk continues to evolve the role of the clerk. Her staff provides an outstanding level of service to the commission, helping with external communications. We need to still work on tracking internal processes.

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:

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 ☒ 5 ☐ N/A ☐

Commission Member Comments:

The Clerk manages her budget well and has created an environment of fiscal stability to the charter office.

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form

Additional Goals Sheet

***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**

Goal 2 - Describe Goal(s):

Please see (5) goals as adopted by the city commission.

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Goal 3 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer - Omichele Gainey 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 self-evaluation 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 - Omichele Gainey Annual Performance Evaluation Form

Fiscal Year: FY20	Evaluator: Commissioner Reina Saco
Charter Officer: Omichele Gainey	Title: City Clerk

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):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Competencies:

1. Business Acumen. Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input checked="" type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer - Omichele Gainey Annual Performance Evaluation Form

- 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 internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

- 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 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer - Omichele Gainey Annual Performance Evaluation Form

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	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

5. **Leading and Supervision.** Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Led and retained diverse team

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Charter Officer Signature: _____

Date: _____

Commission Member Signature: *[Signature]*

Date: *12/18/2020*

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



Charter Officer - Omichele Gainey Annual Performance Evaluation Form

Additional Goals Sheet

***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**

Goal 2 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Goal 3 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



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.
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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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Charter Officer Annual Performance Evaluation Form

Fiscal Year: <u>FY 2020</u>	Evaluator: <u>Gibi Simmon</u>
Charter Officer: <u>Orichelle Gaine</u>	Title: <u>City Clerk</u>

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):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Due to COVID-19 some goals + objectives were difficult to achieve or complete. However, this does NOT diminish the hard work and dedication put forth thus far.

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Competencies:

1. **Business Acumen.** Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Manage your department extremely well.

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form

- 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 internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

Commission Member: Check competency rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Communicate regularly and goes above + beyond to cultivate relationships internal + external. - Excellent job during COVID-19.

Charter Officer: Check self-evaluation rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

- 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 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

operate within budget.

Charter Officer: Check self-evaluation rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form

- 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 1 ☐ 2 ☐ 3 ☐ 4 ☒ 5 ☐ N/A ☐

Commission Member Comments:

N/A

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:

- 5. Leading and Supervision.** Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☒ N/A ☐

Commission Member Comments:

Ms. Gainer leads by example and has assembled a knowledgeable + capable staff.

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:

Charter Officer Signature: _____

Date: _____

Commission Member Signature: Aigi Simmon

Date: 12/15/20

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



Charter Officer Annual Performance Evaluation Form

Additional Goals Sheet

***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**

Goal 2 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Goal 3 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form

Introduction:

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

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Charter Officer Annual Performance Evaluation Form

Fiscal Year: 2020	Evaluator: Omichele D. Gainey – Self Eval Ward
Charter Officer: Omichele D. Gainey	Title: City Clerk

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): **No goals were set for my role by the Commission; however, the City Charter states that my role is to keep records and perform such other duties as prescribed by this act or the commission. My personal goals and accomplishments for this and all other sections of this evaluation period are included in my accomplishments listing.**

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
Commission Member Comments:						

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
Charter Officer Comments:						

Competencies:

1. Business Acumen. Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators; and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
Commission Member Comments:						

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
Charter Officer Comments:						



Charter Officer Annual Performance Evaluation Form

- 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 internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

Commission Member: Check competency rating 1 ☐ 2 ☐ 3 ☐ 4 ☒ 5 ☒ N/A ☐

Commission Member Comments:

I am looking forward to a GRM-style system that keeps constituent services flowing for the commission, as discussed

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☒ 5 ☐ N/A ☐

Charter Officer Comments:

- 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 ☐ 5 ☒ N/A ☐

Commission Member Comments:

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☒ 5 ☐ N/A ☐

Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form

- 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 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:

- 5. Leading and Supervision.** Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check 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:

Charter Officer Signature: *Omichele D. Gainey*

Date: November 30, 2020

Commission Member Signature: *[Signature]*

Date: 12/22/20

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



Charter Officer Annual Performance Evaluation Form

Additional Goals Sheet

***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**

Goal 2 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Goal 3 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

MARSHALL



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 self-evaluation 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 Annual Performance Evaluation Form

Fiscal Year: <u>FY20</u>	Evaluator: <u>D/A</u> Arreola
Charter Officer: <u>T. Marshall</u>	Title: <u>E.O. Director</u>

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):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Well done.

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Competencies:

1. **Business Acumen.** Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Consistent performance.

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form

- 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 internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Well done.

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

- 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 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Consistent Performance.

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form

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	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Well done.

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

5. **Leading and Supervision.** Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Well done.

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Charter Officer Signature: _____

Date: _____

Commission Member Signature: Jan Aul

Date: 12/14/2020

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



Charter Officer Annual Performance Evaluation Form

Additional Goals Sheet

***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**

Goal 2 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Goal 3 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

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.
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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 self-evaluation 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 Annual Performance Evaluation Form

Fiscal Year: 2020	Evaluator: Adrian Hayes-Santos
Charter Officer: Teneeshia Marshall	Title: EOD

Goal(s):

***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): Discussed in meeting

Commission Member: Circle performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Circle self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Competencies:

1. Business Acumen. Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Charter Officer Annual Performance Evaluation Form

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 internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input checked="" type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

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 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Charter Officer Annual Performance Evaluation Form

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	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

5. Leading and Supervision. Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Charter Officer Signature: _____

Date: _____

Commission Member Signature: Adrian Hayes-Santos

Date: 1/5/2021



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:

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.
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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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Charter Officer Annual Performance Evaluation Form – Teneeshia Marshall

Fiscal Year: FY20	Evaluator: Johnson
Charter Officer:	Title:

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):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Competencies:

1. Business Acumen. Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input checked="" type="checkbox"/> .5	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form – Teneeshia Marshall

- 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 internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

- 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 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input checked="" type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form – Teneeshia Marshall

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	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

5. **Leading and Supervision.** Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check rating	1 <input type="checkbox"/>	2 <input checked="" type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Charter Officer Signature: _____

Date: _____

Commission Member Signature: *Yan*

Date: 12/23/20

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

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 Annual Performance Evaluation Form

MARSHALL, TENEESHIA

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 self-evaluation 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 Annual Performance Evaluation Form

Fiscal Year: 2020	Evaluator: POE
Charter Officer: Dir. of Equity & Inclusion	Title: Mayor

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):

1. Equitable Community
2. Sustainable Community
3. Great Place to Live & Experience
4. Resilient Local Economy
5. Best In Class Neighbor Services

Commission Member: Check performance rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input checked="" type="checkbox"/> +	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

The DEI has faced several headwinds as she has worked primarily to achieve goal #1. COVID-19 was a challenge (not unique to her office) and the lack of full staffing has proven to be a barrier to faster progress. I see improvements in both areas, and look forward to even more progress in 2021

Charter Officer: Check self-evaluation rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Competencies:

1. **Business Acumen.** Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input checked="" type="checkbox"/> +	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

I see the DEI improving in this area, with some opportunities for growth still ahead. There is great value in the DEI to get more involved in the procurement side of the org. an area she is beginning to get more fam. with.

Charter Officer: Check self-evaluation rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form

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 internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

Commission Member: Check competency rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input checked="" type="checkbox"/> +	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

This is another area I see growth potential for the DEI. As a newer charter officer, it has been difficult for her to build external & internal relationships due to COVID 19, but an increased focus in 2021 is needed.

Charter Officer: Check self-evaluation rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

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 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

The DEI manages her budget well, even though it was significantly increased with vague direction from the commission. The first priority needs to be to fully staff her department.

Charter Officer: Check self-evaluation rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form

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 1 ☐ 2 ☐ 3 ☐ 4 ☒ 5 ☐ N/A ☐

Commission Member Comments:

I have seen no issues with the ~~DET~~ DEI integrity.

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:

5. Leading and Supervision. Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check rating 1 ☐ 2 ☐ 3 ☒ + 4 ☐ 5 ☐ N/A ☐

Commission Member Comments:

This has been a year of adjustment for the DEI as her team has been in transition. The focus needs to be fully staffing the office to work-flow can be properly delegated & supervised.

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:

Charter Officer Signature: _____

Date: _____

Commission Member Signature: Om R

Date: 12/18/20

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



Charter Officer Annual Performance Evaluation Form

Additional Goals Sheet

***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**

Goal 2 - Describe Goal(s):

see (5) goals as approved by the City Commission.

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Goal 3 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer - Teneeshia Marshall 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.
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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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Charter Officer - Teneeshia Marshall

Annual Performance Evaluation Form

Fiscal Year: FY20	Evaluator: Commissioner Reina Saco
Charter Officer: Teneeshia Marshall	Title: Equal Opportunity 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):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Competencies:

- 1. Business Acumen.** Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input checked="" type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer - Teneeshia Marshall Annual Performance Evaluation Form

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 internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

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 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer - Teneeshia Marshall Annual Performance Evaluation Form

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	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

5. Leading and Supervision. Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Charter Officer Signature: _____

Date: _____

Commission Member Signature: 

Date: 12/18/2020

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



Charter Officer - Teneeshia Marshall Annual Performance Evaluation Form

Additional Goals Sheet

***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**

Goal 2 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Goal 3 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form

Introduction:

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2	Needs Improvement	Work performance on one or more elements is less than expected and requires some improvements to fully meet performance standards.
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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

Fiscal Year: <u>FY 2020</u>	Evaluator: <u>Gibi Simmons</u>
Charter Officer: <u>Teneeshia Marshall</u>	Title: <u>Director Equity & Inclusion</u>

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):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Due to COVID-19, some goals & objectives were difficult to achieve or complete. However, this does NOT diminish the hard work and dedication put forth thus far.

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Competencies:

1. Business Acumen. Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

MS. Marshall fully understand her organization's responsibilities & addresses the strengths and weakness to maximize the function of her department

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form

- 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 internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

Commission Member: Check competency rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

MS. Marshall communicate along all lines internal and external. She has worked extremely hard in addressing and removing barriers across the organization.

Charter Officer: Check self-evaluation rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

- 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 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

NO issues

Charter Officer: Check self-evaluation rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form

- 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 1 ☐ 2 ☐ 3 ☐ 4 ☒ 5 ☐ N/A ☐

Commission Member Comments:

N/A

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:

- 5. Leading and Supervision.** Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☒ N/A ☐

Commission Member Comments:

Ms. Marshall has assembled a team/staff that takes her lead in engaging with community outreach, investigations + fostering principles related to Equity + Inclusion.

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:

Charter Officer Signature: _____

Date: _____

Commission Member Signature: _____

Date: 12-15-20

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



Charter Officer Annual Performance Evaluation Form

Additional Goals Sheet

***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**

Goal 2 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Goal 3 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

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 self-evaluation 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
Annual Performance Evaluation Form

Fiscal Year: FY2020	Evaluator: Mayor Poe
Charter Officer: Teneeshia Marshall	Title: Equal Opportunity Director

Goal(s):

***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): My goal for fiscal year FY2019 was to continue to establish office and organizational needs and stabilize the office. Three high priority focus areas for FY2020 were: Compliance programs, Equity Programs and the disparity study. Additionally, my goal is to always fulfill the needs of the full City Commission. The goal with Compliance Programs was to work on backlog reduction and work towards meeting the 100 day ordinance timeframe. The Equity goal was to start implementing equity programs upon the adoption of equity goals from the City Commission. Lastly, I had a goal of getting a disparity study started around our local small businesses.

Commission Member: Circle performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Circle self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Supports the duties and responsibilities of the Charter as the Equal Opportunity Director as well as the overall support of the City Commission. Works collaboratively as a member of a team with five (5) other Charter Officers. We were able to reduce our aged inventory, but due to COVID and the new protections under Chapter 8 of source of income and immigration status, inquiries went up significantly and source of income complaints came rapidly. Due to this, the office had to hire an additional Compliance Investigator. Now cases are divided between two investigators, internal and external and we will monitor progress in FY2021. The office also increased the amount of settlements reached by over \$6000 from last fiscal year. Equity goals were adopted by the Commission in July 2020 and the office quickly adopted a training plan that will train various levels of employees throughout the organization. The training kicked off in October 2020. My goal was to have a disparity study live by the end of FY2020, but I fell shy of that goal due to COVID and needing to secure a vendor to write the RFP. Currently the RFP is with procurement and will be live by the end of the calendar year.

Competencies:

- 1. Business Acumen.** Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input checked="" type="checkbox"/>
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Charter Officer
Annual Performance Evaluation Form

Charter Officer Comments: Understanding the financial status of the organization is important, however, this office does not make business decisions.

- 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 internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

Commission Member: Check competency rating 1 ☐ 2 ☐ 3 ☒ 4 ☐ 5 ☐ N/A ☐

Commission Member Comments:

We need to work on relationships with community organizations

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☒ 5 ☐ N/A ☐

Charter Officer Comments:

I have created an open-door policy, which all City employees are able to come and speak to me about issues they may be experiencing here within the City. I have also extended this same open-door policy to community members as well. I communicate openly with City Commissioners on issues they need to be aware of. This same communication is used with my peers, departments, community builders and neighbors.

- 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 ☒ 5 ☐ N/A ☐

Commission Member Comments:

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☒ 5 ☐ N/A ☐

Charter Officer Comments:

Fiscal responsibility is something I take very seriously. I constantly check our budget and what we are spending on. I have put internal purchasing systems in place that allow me to monitor every budget dollar spent. The office was reduced to two (2) purchase card holders. At the end of the fiscal year, the office was able to come in under budget and saved \$98,458.60 in personnel expenses and \$27,043.98 in operating expenses.

Charter Officer Annual Performance Evaluation Form

- 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 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:

I will always hold myself and my staff to the highest level of integrity and ethical behavior. It is imperative in my role to always be in compliance with federal, state and local laws, as well as City policy and procedures. Conducting myself in this manner imperative in order for us to maintain public trust.

- 5. Leading and Supervision.** Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check rating 1 ☐ 2 ☐ 3 ☐ 4 ☒ 5 ☐ N/A ☐

Commission Member Comments:

As with 2, we need to develop stronger role in the community

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☒ 5 ☐ N/A ☐

Charter Officer Comments:

My staff often refer to me as a "non-traditional government leader." I challenge my staff to come up with their own ideas and programs, because if they are passionate about it, they will be more excited about working on it. The goals and programs they come up with always meet the mission, vision and goals of the department. I am an outside of the box leader and continue to lead my staff outside of the box. The office has been reorganized and I have been able to build the department with motivated staff who enjoy new challenges and are always ready to serve the public. I hold my staff to a high standard of conduct and ethics and will continue to do so while in this role.

Charter Officer Signature: Ceresethia M. Nantz

Date: 11-13-2020

Commission Member Signature: _____

Date: _____



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:

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 audit 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 agreement 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.

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



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. Add comments you believe provide context to your rating or that would be helpful to the Charter Officer.

Performance Description		
5	Superior	Work performance consistently exceeds expectations and displays a consistent, exceptional performance.
4	Exemplary	Work performance consistently exceeds expectations and key elements of performance consistently in an exceptional manner or sustained periods. This is consistent, outstanding performance.
3	Meets Expectations	Work performance consistently meets 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 self-evaluation 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 Annual Performance Evaluation Form

Fiscal Year:	Evaluator:
Charter Officer:	Title:

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):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Well done

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Competencies:

1. **Business Acumen.** Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Consistent performance.

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
--	----------------------------	----------------------------	----------------------------	----------------------------	----------------------------	------------------------------

Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form

- 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 internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

Commission Member: Check competency rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☒ N/A ☐

Commission Member Comments:

Well done.

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:

- 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 ☒ 5 ☐ N/A ☐

Commission Member Comments:

Consistent performance for small office budget.

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form

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	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Well done.

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

5. **Leading and Supervision.** Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Well done.

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Charter Officer Signature: _____

Date: _____

Commission Member Signature: *[Signature]*

Date: *12/14/2020*

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



Charter Officer Annual Performance Evaluation Form

Additional Goals Sheet

***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**

Goal 2 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Goal 3 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

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 self-evaluation 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 Annual Performance Evaluation Form

Fiscal Year: 2020	Evaluator: Adrian Hayes-Santos
Charter Officer: Nicolle Shalley	Title: Attorney

Goal(s):

***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): Discussed in meeting

Commission Member: Circle performance rating	1 <input type="checkbox"/>	2 <input checked="" type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Circle self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Competencies:

1. Business Acumen. Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input checked="" type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Charter Officer Annual Performance Evaluation Form

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 internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input checked="" type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

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 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Charter Officer Annual Performance Evaluation Form

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	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

5. Leading and Supervision. Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check rating	1 <input type="checkbox"/>	2 <input checked="" type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Charter Officer Signature: _____

Date: _____

Commission Member Signature: Adrian Hayes-Santos

Date: 1/5/2021



Charter Officer Annual Performance Evaluation Form – Nicolle Shalley

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 self-evaluation 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 Annual Performance Evaluation Form – Nicolle Shalley

Fiscal Year:	Evaluator:
Charter Officer:	Title:

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):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input checked="" type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Competencies:

***1. Business Acumen.** Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form – Nicolle Shalley

- 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 internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input checked="" type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

- 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 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input checked="" type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form – Nicolle Shalley

- 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	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

- 5. Leading and Supervision.** Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Charter Officer Signature: _____

Date: _____

Commission Member Signature: *Nicole Shalley*

Date: 12/23/20

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

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.

Omicelle 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.

Niccole 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 Annual Performance Evaluation Form

SHALLEY, NICOLLE

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 self-evaluation 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 Annual Performance Evaluation Form

Fiscal Year: 2020	Evaluator: POE
Charter Officer: City Attorney	Title: Mayor

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):

1. More Equitable Community
2. Sustainable Community
3. Great Place to Live & Experience
4. Resilient Local Economy
5. Best in Class Neighbor Services

Commission Member: Check performance rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

The CA wears many hats. Much of the work of the office goes unseen, as it should be. The CA represents the interests of the city well. I do see an opportunity for improvement in more coordinate communications with the other charter officers & commission, especially with work flow - something she has started.

Charter Officer: Check self-evaluation rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Competencies:

1. **Business Acumen.** Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

The CA is far more competent in this area than she gives herself credit for. She has been involved in many large financial decisions and provided excellent input when needed.

Charter Officer: Check self-evaluation rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form

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 internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

Commission Member: Check competency rating 1 ☐ 2 ☐ 3 ☒ + 4 ☐ 5 ☐ N/A ☐

Commission Member Comments:

This is an opportunity for improvement - organization-wide. The duties of the CA can often be unclear, but more cooperative communication is needed between all charter officers & with the Commission.

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:

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 ☐ 5 ☒ N/A ☐

Commission Member Comments:

The CA manages her department's budget well and provides excellent support for the overall fiscal management of the city.

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form

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 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☒ N/A ☐

Commission Member Comments:

I see the CA as upholding all expectations of integrity and ethical behavior both for herself and her department.

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:

5. Leading and Supervision. Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check rating 1 ☐ 2 ☐ 3 ☐ 4 ☒ 5 ☐ N/A ☐

Commission Member Comments:

The CA manages her department well and has surrounded herself with a great team. I would look for greater opportunities for cross-organization cooperation.

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:

Charter Officer Signature: _____

Date: _____

Commission Member Signature:  _____

Date: 12/18/20

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



Charter Officer Annual Performance Evaluation Form

Additional Goals Sheet

***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**

Goal 2 - Describe Goal(s):

Please refer to the (5) goals adopted by the City Commission

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Goal 3 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
---	----------------------------	----------------------------	----------------------------	----------------------------	----------------------------	------------------------------

Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



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.

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 self-evaluation 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 - Nicolle Shalley

Annual Performance Evaluation Form

Fiscal Year: FY20	Evaluator: Commissioner Reina Saco
Charter Officer: Nicolle Shalley	Title: City Manager

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):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Competencies:

1. Business Acumen. Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer - Nicolle Shalley Annual Performance Evaluation Form

- 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 internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

Commission Member: Check competency rating 1 ☐ 2 ☐ 3 ☐ 4 ☒ 5 ☐ N/A ☐

Commission Member Comments:

Very limited contact w/ public/external. Good communication w/ CC.

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:

- 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 ☐ 5 ☒ N/A ☐

Commission Member Comments:

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:



Charter Officer - Nicolle Shalley Annual Performance Evaluation Form

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 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:

5. **Leading and Supervision.** Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check rating 1 ☐ 2 ☐ 3 ☐ 4 ☒ 5 ☐ N/A ☐

Commission Member Comments:

Limited to no contact w/ staff below CA. Difficult to say about strategies, but staff remains and has limited turnover.

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:

Charter Officer Signature: _____

Date: _____

Commission Member Signature: Nicole Shalley

Date: 12/18/2020

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



Charter Officer - Nicolle Shalley Annual Performance Evaluation Form

Additional Goals Sheet

***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**

Goal 2 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Goal 3 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



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 self-evaluation 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 Annual Performance Evaluation Form

Fiscal Year: <u>FY 2020</u>	Evaluator: <u>Gigi Simmons</u>
Charter Officer: <u>Nicollie Shalley</u>	Title: <u>City Attorney</u>

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):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Competencies:

1. **Business Acumen.** Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators; and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Ms. Shalley fully understands the responsibility at the attorney's office.

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form

- 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 internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

Commission Member: Check competency rating 1 ☐ 2 ☐ 3 ☐ 4 ☒ 5 ☐ N/A ☐

Commission Member Comments:

Communicate effectively and does a great job of promoting frank and open discussions on issues.

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:

- 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 ☒ 5 ☐ N/A ☐

Commission Member Comments:

N/A

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:



Charter Officer Annual Performance Evaluation Form

- 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 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☒ N/A ☐

Commission Member Comments:

N/A

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments:

- 5. Leading and Supervision.** Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check 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:

Charter Officer Signature: _____

Date: _____

Commission Member Signature: Alij Simmon

Date: 12/15/20

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



Charter Officer Annual Performance Evaluation Form

Additional Goals Sheet

***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**

Goal 2 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

Goal 3 - Describe Goal(s):

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



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.
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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.
- 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 self-evaluation 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 Annual Performance Evaluation Form

Fiscal Year: FY2019-2020

Evaluator:

Charter Officer: Nicolle Shalley

Title: City Attorney

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): As stated in the attached Performance Report for the Office of the City Attorney, the primary objective I have set for the Office of the City Attorney 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, in achieving their objectives and strategic initiatives and in defending and pursuing claims and litigation on behalf of the City.

Commission Member: Check performance rating

1 ☐

2 ☐

3 ☐

4 ☒

5 ☐

N/A ☐

Commission Member Comments:

I would like to hear more options from you! Office Regarding direction, as discussed.

Charter Officer: Check self-evaluation rating

1 ☐

2 ☐

3 ☐

4 ☐

5 ☒

N/A ☐

Charter Officer Comments: Throughout my 8+ years of service as the City Attorney (14+ years with the Office of the City Attorney), I work diligently to continuously stay informed of the City's ever changing organizational goals and objectives and structure and manage the Office to be effective and efficient in supporting and furthering our Client's efforts to achieve its goals and objectives.

Competencies:

1. **Business Acumen.** Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

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: My role requires that I constantly engage with my Client to remain well-informed of its business, financial status and core operational areas, as same is critical to providing thoughtful, well-developed and relevant legal guidance. However, recognizing that my role is one of providing legal guidance and not making policy or business decisions, I felt a ranking of 3 on this competency is appropriate.



Charter Officer Annual Performance Evaluation Form

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 internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

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: Well-Informed legal guidance relies on strong and trusting relationships with your Client. I work daily to build and maintain positive and productive relationships with staff at all levels of the City, I want them to know that the attorneys in this Office are readily accessible and here to help them. I encourage you to speak with City staff about their relationship with this Office, I believe you will find that while they may not like our legal guidance from time to time; they do feel welcome to call us, they trust our independent professional judgment and they value our services.

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 ☐ 5 ☒ N/A ☐

Commission Member Comments:

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☒ 4 ☐ 5 ☐ N/A ☐

Charter Officer Comments: I have consistently managed this Office within the budget approved by the City Commission and strive to provide an adequate level of legal services without the need to add additional staff. As the budget of this Office is largely personnel costs and remains relatively static, I felt a ranking of 3 on this competency is appropriate.



Charter Officer Annual Performance Evaluation Form

- 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 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: If there is one thing I hope I have impressed upon each member of the Commission, it is that you can absolutely rely on me and the attorneys who work under my supervision to exhibit the highest level of integrity and ethical behavior and to provide solid legal guidance, uninfluenced by who is asking the question. Integrity and professional independence are critical to the proper function of a City Attorney's Office and I appreciate the Commission recognizing, respecting and valuing that from our Office.

- 5. Leading and Supervision.** Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☒ N/A ☐

Commission Member Comments:

As the "Dean" of our charter team & the institutional memory, you play an important role in the consistent leadership of the organization.

Charter Officer: Check self-evaluation rating 1 ☐ 2 ☐ 3 ☐ 4 ☒ 5 ☐ N/A ☐

Charter Officer Comments: I believe the quality of the work product that you see from our Office, as well as the low staff turnover (collectively our 14 staff members have provided over 144 years of service to the City), best speak to my leadership. I am fortunate to lead a team of highly-motivated professionals who are experienced and dedicated to our public service work – we each truly care about the best outcome for our Client in all the issues that we are involved in. I try to lead by example, avoid micro-managing, provide career progression opportunities (within the policies of the City) and let my team members know how valued and important they are to me and to the operation of this organization. I felt a ranking of 4 is appropriately on this competency because sometimes my involvement in the substantive work (i.e., legal matters, Charter Officer Issues and Commission Issues) leaves me little time to focus on and make improvements to my role as a leader to our team.

Charter Officer Signature:

Nicole M. Shalley

Date:

November 19, 2020

Commission Member Signature:

[Signature]

Date:

12/22/20



MEMORANDUM

Office of the City Attorney

Phone: 334-5011/Fax 334-2229

Box 46

TO: Mayor and City Commissioners **DATE:** November 6, 2020

FROM: Nicolle M. Shalley, City Attorney *NMS*

SUBJECT: FY19-20 Performance Report for the Office of the City Attorney

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
<p>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?</p>	<p>Provided representation for our client in approximately 256 cases and claims, primarily these involve:</p> <ul style="list-style-type: none"> • Labor and employment issues; • Personal injury and other torts; • Police liability; and • Construction and other contract disputes.
<p>How did we perform as advisor in public meetings 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?</p>	<p>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.</p>
<p>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?</p>	<p>Prepared and submitted 55 ordinances and reviewed numerous resolutions.</p> <p>Reviewed and/or drafted agreements and responded to requests for legal services and assisted our client with contract negotiations and resolution of disputes.</p>
<p>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?</p>	<p>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.</p> <p>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.</p>

<p>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?</p>	<p>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.</p>
<p>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?</p>	<p>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.</p>