

Meeting Date: 7/26/2011



Agenda Item # 8-A

CITY COUNCIL AGENDA ITEM

Contact Name: Debbie Renner *DR* **Department Director:** _____
Department/Contact # City Clerk **City Manager:** Jamie Croteau

- Type of Item:**
- | | | | |
|--------------------------|--------------------------|-------------------------------------|---------------------|
| <input type="checkbox"/> | Public Hearing | <input type="checkbox"/> | Resolution |
| <input type="checkbox"/> | Ordinance First Reading | <input checked="" type="checkbox"/> | Discussion & Action |
| <input type="checkbox"/> | Ordinance Second Reading | <input type="checkbox"/> | Council Approval |

Subject: Forms for City Manager Evaluation

BACKGROUND: At the July 12, 2011 Council Meeting direction was given to include a discussion of the City Manager's evaluation form on the next agenda. Further direction was to provide three or four evaluation forms for the Council to review. Based on that direction, City Manager evaluation forms from the following cities are being submitted for your consideration: Deland, Altamonte Springs, and Geneva, New York. Also, included is a copy of the six month evaluation form used for the City Manager in October 2010 and the annual review form used in April.

I have also included an excerpt from the Manager's contract which discusses the evaluation.

RECOMMENDATIONS:

- ATTACHMENTS:** Sample Evaluation Forms (3)
- 6-Month Evaluation Form Used for J. Croteau
 - Most Recently Used Manager's Evaluation Form
 - Excerpt from City Manager's Contract

FINANCIAL IMPACT: Not applicable

Reviewed by City Attorney _____
Reviewed by Finance Dept. _____
Reviewed by: _____

| | | | |
|---|---|--|------------------------------|
| 1st Discussion Date: date. | 2nd Discussion Date: date. | Third Discussion Date: date. | Other Dates: date. |
|---|---|--|------------------------------|

CITY OF DELAND
CITY MANAGER PERFORMANCE APPRAISAL

| | |
|----------------------|----------------------------------|
| EMPLOYEE NAME | JOB TITLE City Manager |
|----------------------|----------------------------------|

| <u>TYPE OF APPRAISAL</u> | <u>OVERALL RATING</u> |
|---|--|
| <input checked="" type="checkbox"/> ANNUAL <input type="checkbox"/> SPECIAL <input type="checkbox"/> END OF PROBATION <input type="checkbox"/> OTHER | OVERALL SCORE: <input type="checkbox"/> OUTSTANDING 134-165 <input type="checkbox"/> EXCEEDS STANDARD 113-133 <input type="checkbox"/> MEETS STANDARDS 93-112 <input type="checkbox"/> BELOW STANDARD <92 |

| | | | |
|---------------------------|-------------|------------------------------|-------------|
| SIGNATURE OF RATER | DATE | SIGNATURE OF EMPLOYEE | DATE |
|---------------------------|-------------|------------------------------|-------------|

| GOALS ESTABLISHED BY CITY COMMISSION FOR FY 2009-2010 | RATER SCORE 1 – 5 (See Legend Below) |
|--|---|
| Successfully implement performance measurement program. | |
| Keep the Commission informed regularly. | |
| Conduct Goal Setting/Strategic Planning Workshop. | |
| Respond to citizen complaints/concerns in a timely manner. | |
| Obtain unqualified audit. | |
| Identify additional cost saving and revenue enhancement opportunities. | |
| Develop 2010/2011 Annual Budget Recommendation. | |
| Complete 2050 Visioning Process. | |
| Assemble Team to Identify Funding Sources for Sustainability Projects. | |
| Provide Assistance to Local Businesses | |
| Maintain expenditures within adopted budget. | |
| Identify strategy for pursuing affordable and sustainable alternative sources of water supply and conservation measures for west side suppliers. | |
| Work with the County of Volusia to develop Joint Planning Agreements for areas around the corporate limits of DeLand. | |
| TOTALS | Maximum points 65 |

Legend

1. Did not accomplish or make progress on any aspect of this goal.
2. Only minor accomplishment of goal. Could have done much better.
3. Accomplished some of the goal. Could have accomplished more with a better utilization of resources.
4. Accomplished most of goal. A little more could have been accomplished.
5. Fully accomplished goal or accomplished all that was possible based upon constraints that could not be directly controlled.

KEY

| | | |
|---------------|---|--|
| LINE 1 | TOTAL POSSIBLE POINTS | |
| LINE 2 | RATER'S SCORE Transfer score to overall rating on first page | |

Evaluation Form – City Manager
Evaluation Period _____

Ratings

| | | | |
|---|--|---|--|
| <u>Exceptional</u> (4) | <u>Exceeds Expectations</u> (3) | <u>Meets Expectations</u> (2) | <u>Below Expectations</u> (1) |
| Consistency exceeds the expectations of the City Council and is clearly superior in terms of quality and performance standards. | Performance which routinely exceeds expectations of the City Council and reflects a thorough and efficient effort. | Fulfillment of the job requirements and expectations of the City Council. | Marginal fulfillment of Council's expectations and shows a need for significant improvement. |

THE CITY MANAGER AS CHIEF ADMINISTRATIVE OFFICER

BUDGET

Is the City Manager's budget realistic? Does he administer it so that he annually operates the City within budget confines?

Overall Rating _____

Comments:

EMPLOYEE SUPERVISION

Does the Manager properly supervise his department heads? Does he, at the same time, maintain a standard of respect for their ability and encourage their initiative? Is he reasonably available to City employees for guidance?

Overall Rating _____

Comments:

PERSONNEL

Has he recruited excellent personnel for the City? Is he accurately informed and deeply concerned about employee insurance, fringe benefits, promotions, and pensions? As chief negotiator for the City, has he achieved expected results?

Overall Rating _____

Comments:

LEADERSHIP

Is he the type of person who inspires others by bringing out the best in his personnel? Is he able to get enthusiastic response to new ideas and needed changes? Is he reasonably forceful and decisive?

Overall Rating _____

Comments:

DEPARTMENTAL PERFORMANCE

Under his leadership, do departments perform effectively? Has he obtained satisfactory performance from his department heads?

Overall Rating _____

Comments:

THE CITY MANAGER AS STAFF ASSISTANT TO COUNCIL

REPORTING

Does he keep the Council well informed? Is information provided by the Manager adequate for the

Council to make sound policy decisions?

Overall Rating _____

Comments:

COUNCIL RELATIONS

Is he receptive to constructive criticism and advice? Does he promptly answer Councilor's inquires/referrals?

Overall Rating _____

Comments:

AGENDA

Does the City Manager prepare a sound agenda that is orderly and balanced? Do agendas reflect Council priorities and issues?

Overall Rating _____

Comments:

THE CITY MANAGER AS A REPRESENTATIVE OF CITY GOVERNMENT

COMMUNITY REPUTATION

Does the community perceive the Manager as a person of integrity, ability, and devotion to the City of Geneva?

Overall Rating _____

Comments:

CITIZEN RELATIONS

Does the City Manager properly handle complaints from citizens? Does the Manager represent the City well before the public and media? Does the City Manager properly support his City Council? When complaints are not valid, does he explain why they are not valid to the citizen? Does he get out of the office frequently, look at things personally, take a deep and honest in Geneva and her people?

Overall Rating _____

Comments:

INTERGOVERNMENT RELATIONS

Does the manager cooperate with our neighboring communities and citizens?

Overall Rating _____

Comments:

GOALS FOR THE NEXT REVIEW PERIOD

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

COMPENSATION

The City Manager's current salary is _____ per annum.

Salary increase by percent: _____.

Effective date: _____

-
-
-
CITY MANAGER COMMENTS

-
-
SIGNATURES

Mayor _____ Date _____

City Manager* _____ Date _____

*Signature does not necessarily indicate agreement with the evaluation

CITY OF ALTAMONTE SPRINGS CITY MANAGER EVALUATION

The purpose of this evaluation is to ensure the highest level of performance of City government through positive communications between the Commission and the Manager.

The Commission's role in the evaluation process cannot be understated. It is imperative to communicate thought, and create an awareness of common interests, ideas, concerns, and goals.

Listed below are eight (8) criteria you will have the opportunity to review and evaluate. When making a rating, consider the overall performance throughout the entire rating period (12 months). At the end of each rating factor there is an area for comments.

The final page includes a space for the overall rating.

Criterion

- * **Organizational Management**
- * **Relationship with Commission**
- * **Intergovernmental Relations**
- * **Long-range Planning**
- * **Fiscal Management**
- * **Relationship with Public**
- * **Program Development and Follow-through**
- * **Personal**

Ratings

- * **Exceptional**
- * **Good Performance**
- * **Needs Improvement**
- * **Unsatisfactory**

Rating

Fiscal Management

Plans and organizes preparation of an annual budget in a format understandable to the Commission and the public.

Administers the adopted budget within approved revenues and expenditures.

Plans, organizes, and supervises the most economic utilization of manpower, materials and equipment.

Comments: _____

Rating

Relationship with Commissioners

Maintains effective communications, both verbal and written, with the Commission.

Maintains availability to the Commission, whether personally or through designated subordinates.

Establishes and maintains a system of reporting to the Commission on current plans and activities of the staff.

Provides clear, concise and timely information on agenda matters.

Comments: _____

Rating

Relationship with Public

Demonstrates a sincere interest in the community.

Establishes and maintains an image of the City to the community that represents service, vitality and professionalism.

Promotes an attitude of helpfulness, courtesy and sensitivity among employees coming in contact with the public.

Works effectively with the local news media.

Comments: _____

Rating

Intergovernmental Relations

Maintains effective communications with other governmental jurisdictions and agencies of the State.

Maintains close relationship with peers in other units of government.

Maintains awareness of developments and plans in other jurisdictions that may relate to, or affect this City.

Comments: _____

Rating

Program Development and Follow-through

Plans and organizes the on-going programs and services of the City.

Plans and organizes the work involved in researching program/policy suggestions by the Commission and the reporting of the results of the research/analysis.

Maintains knowledge of current and innovative trends in the area of services being provided by local governments and incorporates that knowledge into program suggestions and research.

Plans, organizes and supervises the implementation of programs adopted by the Commission.

Comments: _____

Rating

Long-range Planning

Maintains knowledge of new technologies, systems, methods, etc., in relation to City services.

Keeps the Commission advised of new and impending legislation and developments in the area of Public Policy.

Administers and organizes the process of program planning in anticipation of future needs and concerns.

Comments: _____

Personal

Does the manager display initiative and innovation in solving problems?

Do subordinates respect the manager?

Is the manager unemotional and objective in his handling of people and problems?

Does the manager make timely decisions?

Is the manager willing to spend adequate time to complete his workload?

Does the manager have the firmness of his convictions?

Will the manager consider and weigh input from others?

Does the manager delegate sufficiently?

Does the manager promote professionalism and professional ethics?

Comments: _____

Overall Rating _____

Signature

Date

Performance Evaluation for: Jamie Croteau, City Manager

Evaluation Period: _____

RATINGS

4 = Exceeds Expectations 2 = Needs Improvement
 3 = Meets Expectations 1 = Does Not Meet Minimum Requirements

| RATING CATEGORIES | RATING |
|-------------------------------|--------|
| Knowledge of Issues | |
| Planning & Organizing Skills | |
| Proactive Approach On Issues | |
| Problem Solving Skills | |
| Decision Making and Judgement | |
| Verbal Communication Skills | |
| Written Communication Skills | |
| Creditability | |
| Creativity | |
| Overall Performance | |

Suggestions for improvement regarding the above areas (specific areas that need strengthening):

Commendations regarding the above areas (area(s) of performance calling for praise):

Additional Comments:

Evaluation completed by: Name of Evaluator _____

Signature _____

Date Evaluation Completed _____

Next Evaluation due on: April 26, 2012

EVALUATION OF CITY MANAGER

SECTION I. PERFORMANCE EVALUATION

Rank your perception as to whether the City Manager meets the standards presented below based upon the rating scale presented below. Please mark in the space provided your rating , and provide a narrative comment concerning the subject matter of the descriptive statement.

RATING SCALE FOR SECTION 1

0 - NOT OBSERVED

1 - DOES NOT MEET MINIMUM STANDARDS

Results show deficiencies which seriously interfere with the attainment of the principal responsibilities of the position.

2 - NEEDS IMPROVEMENT

Improvement is needed primarily in specific area(s) noted in comments section under each area of evaluation.

3 - MEETS EXPECTATIONS

Results show job responsibilities are being performed completely.

4 - EXCEEDS EXPECTATIONS

Results show achievements which are valuable to the city, and are beyond the job's objectives. Such performance exceeds what is reasonable to expect of the City Manager.

LEADERSHIP/PERSONAL INITIATIVE/PROFESSIONAL ATTITUDE

This performance element describes leadership efforts, personal growth, motivation, and personal initiative and drive. The criteria to be used in evaluation is as follows:

- _____ Sets and enforces high, yet attainable, work standards;
- _____ Motivates self and others to maximum performance;
- _____ Work efforts lead toward successful accomplishment of goals;
- _____ Demonstrates drive and initiative in achieving organizational goals and objectives;
- _____ Demonstrates ability to perform tasks energetically and puts forth extra effort in task completion;
- _____ Responds and adjusts quickly to extra demands on time;
- _____ Achieves respect from others while maintaining credibility as an individual;
- _____ Exhibits professional and personal integrity and is emotionally stable;
- _____ Keeps the Council informed on problems, progress and issues;
- _____ Takes consistent position with different audiences.

Total _____ / 10 = _____

| DOES NOT MEET MIMIMUM REQUIREMENTS | NEEDS IMPROVEMENT | MEETS EXPECTATIONS | EXCEEDS EXPECTATIONS | NOT OBSERVED |
|------------------------------------|-------------------|--------------------|----------------------|--------------|
| | | | | |

Please list those criteria which you believe the Manager either does not meet expectations or exceeds expectations: _____

TECHNICAL KNOWLEDGE

This performance element relates to technical competence. The criteria to be used in evaluation is as follows:

- _____ General overall knowledge of the operations and responsibilities of the city, linking policy into operation;
- _____ Ability to integrate and implement technical and managerial knowledge within available resources;
- _____ Keeps current on management issues and professional concerns, trends, techniques, and methods of operating a city;
- _____ Keeps current on legislation that may affect the city.

Total _____ / 4 = _____

| DOES NOT MEET MIMIMUM REQUIREMENTS | NEEDS IMPROVEMENT | MEETS EXPECTATIONS | EXCEEDS EXPECTATIONS | NOT OBSERVED |
|------------------------------------|-------------------|--------------------|----------------------|--------------|
| | | | | |

Please list those criteria which you believe the Manager either does not meet expectations or exceeds expectations: _____

INTERPERSONAL RELATIONS

This performance element relates to how the Manager works with other professionals, the Councilmembers, the elected bodies of other local governments, and the general public. The criteria to be used in evaluation are as follows:

- _____ Sensitivity to people or groups (impact on people, feelings, understands needs, wants, etc.);
- _____ Consistent in dealing with people;
- _____ Ability to work with people and groups;
- _____ Able to establish and maintain trust relationships with the Councilmembers, other local governments, the business community, as well as the staff;
- _____ Ability to effectively handle conflicts;
- _____ Shows tact and diplomacy;
- _____ Ability to activate effective interpersonal relationships in others;
- _____ Ability to accept feedback and act on concerns;
- _____ Minimizes personal biases.

Total _____ / 9 = _____

| DOES NOT MEET MIMIMUM REQUIREMENTS | NEEDS IMPROVEMENT | MEETS EXPECTATIONS | EXCEEDS EXPECTATIONS | NOT OBSERVED |
|------------------------------------|-------------------|--------------------|----------------------|--------------|
| | | | | |

Please list those criteria which you believe the Manager either does not meet expectations or exceeds expectations: _____

COMMUNICATIONS

This performance element represents interaction with the public, Councilmembers, and other groups and individuals. The criteria to be used in evaluation are as follows:

- _____ Ability and willingness to communicate (express to others) as well as listen to what is being said;
- _____ Ability to write in an understandable, accurate, concise, complete, timely, and positive manner;
- _____ Ability to speak in an understandable, accurate, concise, complete, timely, and positive manner;
- _____ Ability to communicate with different groups, citizens, agencies, local governments, subordinates, peers, and Councilmembers;
- _____ Keeps the Council informed on all matters of its concern;
- _____ Ability to prepare and present an effective agenda;
- _____ Effective communication of the Council’s position to other agencies and the general public;
- _____ Provide the Council with adequate information upon which to make decisions;
- _____ Trains staff to react positively to citizen concerns.

Total _____ / 9 = _____

| DOES NOT MEET MIMIMUM REQUIREMENTS | NEEDS IMPROVEMENT | MEETS EXPECTATIONS | EXCEEDS EXPECTATIONS | NOT OBSERVED |
|------------------------------------|-------------------|--------------------|----------------------|--------------|
| | | | | |

Please list those criteria which you believe the Manager either does not meet expectations or exceeds expectations: _____

ADMINISTRATIVE AND MANAGEMENT ACTIVITIES

This performance element relates to administration, time management, and problem solving activities. The criteria to be used in evaluation are as follows:

- _____ Understands state and local laws and regulations pertaining to the effective operation of a city;
- _____ Consistently meets deadlines for agendas, status reports, budgets, and other special and routine reports relating to the duties and responsibilities of the City Manager.
- _____ Administers a number of on-going projects successfully;
- _____ Clearly defines problems and demonstrates creativity, decisiveness, and imagination in solving them;
- _____ Anticipates problems and takes preventative measures;
- _____ Uses consensus problem-solving strategies when appropriate, and actively seeks support from staff;
- _____ Encourages participation by those who will be impacted by a decision;
- _____ Motivates others by encouraging creativity and the pursuit of excellence;
- _____ Develops long and short-range goals and objectives which are consistent with policies established by the Council;

- _____ Ability to effectively delegate and make assignments with appropriate authority, and ability to monitor and evaluate performance.

Total _____ / 10 = _____

| DOES NOT MEET MIMIMUM REQUIREMENTS | NEEDS IMPROVEMENT | MEETS EXPECTATIONS | EXCEEDS EXPECTATIONS | NOT OBSERVED |
|------------------------------------|-------------------|--------------------|----------------------|--------------|
| | | | | |

Please list those criteria which you believe the Manager either does not meet expectations or exceeds expectations: _____

MANAGEMENT OF HUMAN RESOURCES

This performance element describes supervisory and personnel management abilities. The criteria to be used in evaluation are as follows:

- _____ Directs staff and resources to meet deadlines;
- _____ Chooses tasks for delegation which maximize staff ability and is able to monitor and control delegated work;
- _____ Provides on-going feedback to staff regarding their performances;
- _____ Prepares comprehensive performance evaluations for staff;
- _____ Provides staff with opportunities for appropriate professional development and training;
- _____ Encourages creativity from staff and creates an accessible environment for consultation with staff;
- _____ Establishes policies and procedures that maximize autonomy of staff and streamlines the delivery of services;
- _____ Sets and maintains standards for quality of staff reports, both oral and written.

Total _____ / 8 = _____

| DOES NOT MEET MIMIMUM REQUIREMENTS | NEEDS IMPROVEMENT | MEETS EXPECTATIONS | EXCEEDS EXPECTATIONS | NOT OBSERVED |
|------------------------------------|-------------------|--------------------|----------------------|--------------|
| | | | | |

Please list those criteria which you believe the Manager either does not meet expectations or exceeds expectations: _____

FISCAL MANAGEMENT/BUDGETING

This performance element describes fiscal management skills and abilities to present responsible fiscal planning and budgeting. The criteria to be used in evaluation are as follows:

- _____ Plans and organizes the presentation of the annual budget, conforming to guidelines established by law and the city;
- _____ Controls expenditures within set budget levels;
- _____ Effectively executes and monitors the budget;
- _____ Maintains cost-effective manpower allocations;
- _____ Plans and organizes systems for reporting revenue and expenditure data to the Council.

Total _____ / 5 = _____

| DOES NOT MEET MIMIMUM REQUIREMENTS | NEEDS IMPROVEMENT | MEETS EXPECTATIONS | EXCEEDS EXPECTATIONS | NOT OBSERVED |
|------------------------------------|-------------------|--------------------|----------------------|--------------|
| | | | | |

Please list those criteria which you believe the Manager either does not meet expectations or exceeds expectations: _____

7. **Evaluation.**

(a) The City Council shall review and evaluate the performance of the Employee at least once annually. Said review and evaluation shall be in accordance with specific performance criteria that may be developed by the City Council and Employee. Once initially developed, the criteria may be modified by the City Council and Employee. The initial evaluation under this Agreement shall be due and completed in October, 2010, and subsequent reviews and evaluations shall occur each year thereafter on or about the anniversary date of initial employment.

(b) In furtherance of defining the performance criteria, the City Council and Employee shall annually define such goals and performance objectives that they deem necessary for the proper operation of the City and in the attainment of City Council's policy goals and objectives. The relative priority among the various goals and objectives shall be reduced to writing. They shall generally be handled within the time limitations as specified and the annual operating and capital budgets and appropriations provided.

(c) The parties recognize that Employee's performance evaluation by the City Council may not occur exactly on the anniversary date, but it will likely coincide with the regular meeting schedule of the City Council.