

Regular Workshop - November 12, 2012  
Agenda Item 9

**Agenda Item:** Town Manager's Annual Performance Evaluation

**Presenter:** Town Manager

**Summary:** A provision of the Town Manager's employment agreement is for the Commission to review and evaluate the job performance of the Town Manager at least once, annually, for each year of the employment agreement. The agreement also states that the Town Commission shall define the goals and objectives of the Town Manager at least annually.

**Attachments:** 11-06-12 Memo, Human Resources Manager to Commission;  
Town Manager Evaluation Forms.

**Recommended**

**Action:** Pending discussion, provide direction to Manager.

## MEMORANDUM

Date: November 6, 2012

**TO:** Town Commission  
**FROM:** Lisa Silvertooth, Human Resources Manager  
**SUBJECT:** Town Manager's Annual Performance Evaluation

---

A provision of the Town Manager's employment agreement is for the Commission to review and evaluate the job performance of the Town Manager at least once, annually, for each year of the employment agreement.

The agreement also states that the Town Commission shall define the goals and objectives of the Town Manager at least annually.

Attached are copies of the Town Manager's evaluations that were completed by Town Commissioners and received in my office by November 6, 2012.

This item is placed on the November 12, 2012 Regular Workshop Meeting for Commission consideration and discussion.

Please contact me if you have any questions or need assistance.

Town of Longboat Key  
Town Manager Performance Evaluation

Evaluation period: November 1, 2011 to October 31, 2012

Jim Brown  
Governing Body Member's Name

Each member of the governing body should complete this evaluation form, sign it in the space below, and return it to Lisa Silvertooth. The deadline for submitting this performance evaluation is October 31, 2012. Evaluations will be summarized and included on the agenda for discussion at the Workshop to be held on November 12, 2012.

\_\_\_\_\_  
Mayor's Signature

\_\_\_\_\_  
Date

Jim Brown  
Governing Body Signature

10/23/2012  
Date Submitted

## **TOWN OF LONGBOAT KEY TOWN MANAGER PERFORMANCE EVALUATION**

THIS PERFORMANCE EVALUATION SHOULD NOT BE CONSTRUED AS A CONTRACTUAL PROMISE, A CONTRACT OR COVENANT OF EMPLOYMENT, NOR IS IT A GUARANTEE OF EMPLOYMENT FOR ANY SPECIFIED LENGTH OF TIME. CONTINUED EMPLOYMENT IS ALWAYS AT THE TOWN COMMISSIONS DISCRETION.

### **PURPOSE**

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

Specifically, the evaluation should serve the following needs:

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

### **INSTRUCTIONS**

Attached is the evaluation form for the Town Manager. It encompasses six primary areas: (I) Administration; (II) Managing Information; (III) Community Relations; (IV) Commission Relations; (V) Professionalism; (VI) Personal Traits and Interpersonal Skills; (VII) Special Projects.

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

### **RATING SYMBOLS**

Rating symbols are used to make assessments. They fall into four categories:

- 0 Unacceptable Performance
- 1 Below Expectations (performance has been below reasonable expectations)
- 2 Meets Expectations (performance has attained a level of reasonable expectation)
- 3 Exceeds Expectations (performance has been above reasonable expectations)

Each criteria should be rated and any specific comments or observations should be noted in the spaces provided for comments. The Special Projects section should contain the specific objectives selected for the particular performance period (usually annual).

**ADMINISTRATION:**

3	2	1	0	
				<b>Managing Human Resources</b>
				Encourages Growth and Development of Subordinates
				Affirmative Action Compliance
				Provides an Equitable Personnel Evaluation System
				Develops Coordination Among Subordinates
				Positively Motivates Subordinates

*No OBSERVED*

**Comments:**

---



---



---

3	2	1	0	
				<b>Managing Financial Resources</b>
✓				Does Effective Budget Planning and Preparation
✓				Effectively Manages Budget Execution and Fiscal Soundness
✓				Maintains a High Level of Productivity
✓				Provides Cost Effective Manpower Utilization

**Comments:**

---



---



---

3	2	1	0	
✓				<b>Managing Work Systems and Operations</b>
✓				Ability to Conceptualize Needs of The Organization / Town
✓				Ability to Organize Programs/Increase Efficiency and Effectiveness
✓				Displays Long-term Organizational Planning Skills
✓				Effectively Manages Delivery of Services to the Citizens
✓				Effectively Manages Change

**Comments:**

---



---



---

3	2	1	0	
✓				<b>Managing Information</b>
✓				Provides Concise and Understandable Written Reports
✓				Provides Effective Public Contact / Communication
✓				Agenda Preparation
✓				Verbal Presentation Skills

**Comments:**

---



---



---

**COMMUNITY RELATIONS:**

3	2	1	0	
✓				Accessible
✓				Participates in Community Activities
✓				Effective Listener
✓				Promotes Credibility

**Comments:**

---

---

---

**COMMISSION RELATIONS:**

3	2	1	0	
✓				Accessible
✓				Responsive to Requests
✓				Communicates Effectively
✓				Impartial Among Commissioners
✓				Effective Listener
✓				Encourages Commission Involvement
✓				Demonstrates a High Level of Flexibility
✓				Receptive to Constructive Criticism and Advice

**Comments:**

---

---

---

**PROFESSIONALISM:**

3	2	1	0	Professional Conduct
✓				Execution of Commission Goals and Objectives
✓				Liaison with Other Agencies
✓				News Media Relations
✓				Adherence to High Ethical Standards
✓				Commitment to Goals of Profession

**Comments:**

---

---

---

---

**PERSONAL TRAITS AND INTERPERSONAL SKILLS:**

3	2	1	0	Leadership
✓				Setting a Proper Example
✓				Inspiring Cooperation
✓				Delegating Responsibility

**Comments:**

---

---

---

---

3	2	1	0		<b>Judgment</b>
✓					Weighing Facts and Drawing Conclusions
✓					Using Foresight in Planning
✓					Making Reliable Decisions as Required
✓					Common Sense
✓					Tact and Diplomacy

**Comments:**

---



---



---



---

3	2	1	0		<b>Self-Confidence</b>
✓					Expression of Opinion
✓					Competitive Spirit
✓					Poise Under Pressure

**Comments:**

---



---



---



---

3	2	1	0	Open-Mindedness
✓				Flexibility
✓				Fairness and Impartiality
✓				Receptiveness to Suggestions

**Comments:**

---



---



---

**SPECIAL PROJECTS:**

**Comments:**

---



---



---

Town of Longboat Key  
Town Manager Performance Evaluation

Evaluation period: November 1, 2011 to October 31, 2012

DAVID W BRENNER  
Governing Body Member's Name

Each member of the governing body should complete this evaluation form, sign it in the space below, and return it to Lisa Silvertooth. The deadline for submitting this performance evaluation is October 31, 2012. Evaluations will be summarized and included on the agenda for discussion at the Workshop to be held on November 12, 2012.

\_\_\_\_\_  
Mayor's Signature

\_\_\_\_\_  
Date

*David W Brenner*  
\_\_\_\_\_  
Governing Body Signature

*10/30/2012*  
\_\_\_\_\_  
Date Submitted

## **TOWN OF LONGBOAT KEY TOWN MANAGER PERFORMANCE EVALUATION**

**THIS PERFORMANCE EVALUATION SHOULD NOT BE CONSTRUED AS A CONTRACTUAL PROMISE, A CONTRACT OR COVENANT OF EMPLOYMENT, NOR IS IT A GUARANTEE OF EMPLOYMENT FOR ANY SPECIFIED LENGTH OF TIME. CONTINUED EMPLOYMENT IS ALWAYS AT THE TOWN COMMISSIONS DISCRETION.**

### **PURPOSE**

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

Specifically, the evaluation should serve the following needs:

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

### **INSTRUCTIONS**

Attached is the evaluation form for the Town Manager. It encompasses six primary areas: (I) Administration; (II) Managing Information; (III) Community Relations; (IV) Commission Relations; (V) Professionalism; (VI) Personal Traits and Interpersonal Skills; (VI) Special Projects.

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

### **RATING SYMBOLS**

Rating symbols are used to make assessments. They fall into four categories:

- 0 Unacceptable Performance
- 1 Below Expectations (performance has been below reasonable expectations)
- 2 Meets Expectations (performance has attained a level of reasonable expectation)
- 3 Exceeds Expectations (performance has been above reasonable expectations)

Each criteria should be rated and any specific comments or observations should be noted in the spaces provided for comments. The Special Projects section should contain the specific objectives selected for the particular performance period (usually annual).

**ADMINISTRATION:**

3	2	1	0	Managing Human Resources
	X			Encourages Growth and Development of Subordinates
	X			Affirmative Action Compliance
	X			Provides an Equitable Personnel Evaluation System
	X			Develops Coordination Among Subordinates
X				Positively Motivates Subordinates

*ANNIE ROSS EXPERIMENT*

**Comments:** *Communication with subordinates is uneven  
e.g. Annie Ross Experiment either well received or skeptical*

3	2	1	0	Managing Financial Resources
X				Does Effective Budget Planning and Preparation
X				Effectively Manages Budget Execution and Fiscal Soundness
X				Maintains a High Level of Productivity
	X			Provides Cost Effective Manpower Utilization

**Comments:**

3	2	1	0	Managing Work Systems and Operations
	X			Ability to Conceptualize Needs of The Organization / Town
	X			Ability to Organize Programs/Increase Efficiency and Effectiveness
X				Displays Long-term Organizational Planning Skills
	X			Effectively Manages Delivery of Services to the Citizens
	X			Effectively Manages Change

Comments:

---



---



---

3	2	1	0	Managing Information for Commission
X				Provides Concise and Understandable Written Reports
X				Provides Effective Public Contact / Communication
X				Agenda Preparation
X				Verbal Presentation Skills

Comments: We are well prepared with reports and other means of communication

---



---



---

**COMMUNITY RELATIONS:**

3	2	1	0	
X				Accessible
	X			Participates in Community Activities
X				Effective Listener
X				Promotes Credibility

**Comments:**

---

---

---

---

**COMMISSION RELATIONS:**

3	2	1	0	
X				Accessible
	X			Responsive to Requests
X				Communicates Effectively
	X			Impartial Among Commissioners
X				Effective Listener
X				Encourages Commission Involvement
	X			Demonstrates a High Level of Flexibility
	X			Receptive to Constructive Criticism and Advice

**Comments:**

---

*This important facet of his job is done well.*

---

---

**PROFESSIONALISM:**

3	2	1	0	Professional Conduct
	X			Execution of Commission Goals and Objectives
X				Liaison with Other Agencies
	X			News Media Relations
X				Adherence to High Ethical Standards
X				Commitment to Goals of Profession

**Comments:**

---

---

---

---

**PERSONAL TRAITS AND INTERPERSONAL SKILLS:**

3	2	1	0	Leadership
X				Setting a Proper Example
	X			Inspiring Cooperation
	X			Delegating Responsibility

**Comments:**

*The staff is still adjusting to Dave's style  
in every communication - see earlier comment*

---

---

---

---

3	2	1	0	Judgment
	X			Weighing Facts and Drawing Conclusions
X				Using Foresight in Planning
X				Making Reliable Decisions as Required
X				Common Sense
	X			Tact and Diplomacy

**Comments:**

---



---



---



---

3	2	1	0	Self-Confidence
X				Expression of Opinion
X				Competitive Spirit
X				Poise Under Pressure

**Comments:** *The Town has more on its plate than was originally realized.*

---



---

3	2	1	0	
	X			Flexibility
	X			Fairness and Impartiality
	X			Receptiveness to Suggestions

**Open-Mindedness**

**Comments:**

---



---



---

**SPECIAL PROJECTS:**

**Comments:** *Reorganized approach to beach management  
Successfully*

---



---

Commissioner Duncan

Town of Longboat Key  
Town Manager Performance Evaluation

Evaluation period: November 1, 2011 to October 31, 2012

Governing Body Member's Name

Each member of the governing body should complete this evaluation form, sign it in the space below, and return it to Lisa Silvertooth. The deadline for submitting this performance evaluation is October 31, 2012. Evaluations will be summarized and included on the agenda for discussion at the Workshop to be held on November 12, 2012.

\_\_\_\_\_  
Mayor's Signature

\_\_\_\_\_  
Date

  
\_\_\_\_\_  
Governing Body Signature

10-15-2012  
\_\_\_\_\_  
Date Submitted

**DAVID BULLOCK-- TOWN OF LONGBOAT KEY  
TOWN MANAGER PERFORMANCE EVALUATION  
BY COMMISSIONER, JACK DUNCAN  
OCTOBER 8, 2012**

THIS PERFORMANCE EVALUATION SHOULD NOT BE CONSTRUED AS A CONTRACTUAL PROMISE, A CONTRACT OR COVENANT OF EMPLOYMENT, NOR IS IT A GUARANTEE OF EMPLOYMENT FOR ANY SPECIFIED LENGTH OF TIME. CONTINUED EMPLOYMENT IS ALWAYS AT THE TOWN COMMISSIONS DISCRETION.

**PURPOSE**

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

Specifically, the evaluation should serve the following needs:

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

**INSTRUCTIONS**

Attached is the evaluation form for the Town Manager. It encompasses six primary areas: (I) Administration; (II) Managing Information; (III) Community Relations; (IV) Commission Relations; (V) Professionalism; (VI) Personal Traits and Interpersonal Skills; (VII) Special Projects.

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

**RATING SYMBOLS**

Rating symbols are used to make assessments. They fall into four categories:

- 0 Unacceptable Performance
- 1 Below Expectations (performance has been below reasonable expectations)
- 2 Meets Expectations (performance has attained a level of reasonable expectation)
- 3 Exceeds Expectations (performance has been above reasonable expectations)

Each criteria should be rated and any specific comments or observations should be noted in the spaces provided for comments. The Special Projects section should contain the specific objectives selected for the particular performance period (usually annual).

**ADMINISTRATION:**

3	2	1	0	
	X			Encourages Growth and Development of Subordinates
X				Affirmative Action Compliance
X				Provides an Equitable Personnel Evaluation System
	X			Develops Coordination Among Subordinates
	X			Positively Motivates Subordinates

**Comments:**

“Succession Planning” is a key priority for the future-- based on good management practices and the age of senior staff. Little was done by the prior Town Manager to insure a flow of experienced, qualified Senior/Executive managers. This needs to be aggressively addressed by the current Town Manager and staff, as critical players will soon be reaching retirement age. The issue of succession regarding the Town Attorney position also needs to be addressed for the same reason.

3	2	1	0	
X				Does Effective Budget Planning and Preparation
X				Effectively Manages Budget Execution and Fiscal Soundness
X				Maintains a High Level of Productivity
	X			Provides Cost Effective Manpower Utilization

**Comments:**

THIS YEARS BUDGET PROCESS WAS EFFICIENT, TRANSPARENT AND FORWARD THINKING AS IT RELATES TO DAY-TO-DAY OPERATIONS AS WELL AS FUTURE INFRASTRUCTURE DEVELOPMENT.

THIS YEARS BUDGET PROCESS WAS EFFICIENT, TRANSPARENT AND FORWARD THINKING AS IT RELATES TO DAY-TO-DAY OPERATIONS AS WELL AS FUTURE INFRASTRUCTURE DEVEVELOPMENT.

3	2	1	0	<b>Managing Work Systems and Operations</b>
X				Ability to Conceptualize Needs of The Organization / Town
X				Ability to Organize Programs/Increase Efficiency and Effectiveness
X				Displays Long-term Organizational Planning Skills
X				Effectively Manages Delivery of Services to the Citizens
X				Effectively Manages Change

**Comments:**

DAVE EFFECTIVELY MANAGES FOR CHANGE. HE HAS PROVEN HIMSELF TO BE A TRUE ADVOCATE FOR CHANGE. WITH THE LONG TERM PLANNING PROCESS HE IS DEVELOPING LBK WILL HOPEFULLY MANAGE CHANGE IN THE FUTURE AS OPPOSED TO REACTING TO CHANGE.

3	2	1	0	<b>Managing Information</b>
X				Provides Concise and Understandable Written Reports
X				Provides Effective Public Contact / Communication
X				Agenda Preparation
X				Verbal Presentation Skills

**Comments:**

BOTH THE BUDGET PROCESS AS WELL AS THE PENSION PROCESS DEMONSTRATES DAVES ABILITY TO SIMPLIFY COMPLEX ISSUES FOR THE PUBLIC, STAFF AND COMMISSION AND COMMUNICATE THEM IN A WAY THAT HELPS TO FOSTER DIFINITIVE ACTION.

**COMMUNITY RELATIONS:**

3	2	1	0	
X				Accessible
X				Participates in Community Activities
X				Effective Listener
X				Promotes Credibility

**Comments:**

DAVE HAS SEEN MORE CITIZENS AND GATHERED MORE INFORMATION FROM OUR CITIZENS IN HIS FIRST YEAR AS TOWN MANAGER, THAN I THOUGHT WAS POSSIBLE. HE IS AN EFFECTIVE LISTNER, CREDIBLE IN HIS POSITIONS AND IS TOTLALLY ENGAGED AS A PARTICIPANT IN COMMUNITY ACTIVITIES.

**COMMISSION RELATIONS:**

3	2	1	0	
X				Accessible
X				Responsive to Requests
X				Communicates Effectively

	X			Impartial Among Commissioners
X				Effective Listener
X				Encourages Commission Involvement
	X			Demonstrates a High Level of Flexibility
	X			Receptive to Constructive Criticism and Advice

**Comments:**

Constructive weekly meetings are held with the TM. Communications are clear and meaningful. David is responsive to all requests. My perception is David does tend to be more responsive to the Mayor and Vice-Mayor than to other Commissioners.

**PROFESSIONALISM:**

3	2	1	0	Professional Conduct
X				Execution of Commission Goals and Objectives
X				Liaison with Other Agencies
X				News Media Relations
X				Adherence to High Ethical Standards
X				Commitment to Goals of Profession

**Comments:**

Dave is a consummate professional in every aspect of the word. Of particular note is the networking skill he displays with other outside agencies. Dave is not only "Well Connected" he uses his relationships with other agencies in a non-threatening way for the benefit of LBK. In all my interactions with Dave I have never seen him stretch ethical boundaries.

**PERSONAL TRAITS AND INTERPERSONAL SKILLS:**

3	2	1	0	Leadership
	X			Setting a Proper Example
	X			Inspiring Cooperation
	X			Delegating Responsibility

**Comments:**

Dave demonstrates good leadership skills. Cooperation among employees and departments is not inspired it is expected and demonstrated by example. Delegation has been a challenge for Dave as the immediacy required to solve major issues has required a direct approach. However, I have begun to see Dave delegate more and more as time passes and the need to take control of certain issues diminishes.

3	2	1	0	Judgment
X				Weighing Facts and Drawing Conclusions
X				Using Foresight in Planning
X				Making Reliable Decisions as Required
X				Common Sense
X				Tact and Diplomacy

**Comments:**

First and foremost, Dave is an excellent listener and gathers significant amounts of information before making decisions. Thus, Dave exceeds expectations for all of the above, including tact and diplomacy.

3	2	1	0	
	X			<b>Self-Confidence</b>
				Expression of Opinion
X				Competitive Spirit
X				Poise Under Pressure

**Comments:**

Dave seems oblivious to pressure and this goes to his broad base of experience and a high level of poise. However, when expressing opinions, especially to less experienced subordinates, Dave needs to be more considerate of others by not always being dismissive of stress but rather acknowledging pressure and helping / inspiring those with less poise to deal with it.

3	2	1	0	
	X			<b>Open-Mindedness</b>
				Flexibility
	X			Fairness and Impartiality
X				Receptiveness to Suggestions

**Comments:**

Again, Dave meets or exceeds expectations for all of the above behavioral characteristics. Dave needs to be sure not to show partiality toward the functional processes used in managing county government. Dave needs to remember that although there are many

---

similarities between managing counties and municipalities, LBK is a small Town and needs to be managed as such.

---

---

---

Town of Longboat Key  
Town Manager Performance Evaluation

Evaluation period: November 1, 2011 to October 31, 2012

TERRY GANS  
Governing Body Member's Name

Each member of the governing body should complete this evaluation form, sign it in the space below, and return it to Lisa Silvertooth. The deadline for submitting this performance evaluation is October 31, 2012. Evaluations will be summarized and included on the agenda for discussion at the Workshop to be held on November 12, 2012.

\_\_\_\_\_  
Mayor's Signature

\_\_\_\_\_  
Date

  
\_\_\_\_\_  
Governing Body Signature

11/5/2012  
\_\_\_\_\_  
Date Submitted

## **TOWN OF LONGBOAT KEY TOWN MANAGER PERFORMANCE EVALUATION**

THIS PERFORMANCE EVALUATION SHOULD NOT BE CONSTRUED AS A CONTRACTUAL PROMISE, A CONTRACT OR COVENANT OF EMPLOYMENT, NOR IS IT A GUARANTEE OF EMPLOYMENT FOR ANY SPECIFIED LENGTH OF TIME. CONTINUED EMPLOYMENT IS ALWAYS AT THE TOWN COMMISSIONS DISCRETION.

### **PURPOSE**

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

Specifically, the evaluation should serve the following needs:

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

### **INSTRUCTIONS**

Attached is the evaluation form for the Town Manager. It encompasses six primary areas: (I) Administration; (II) Managing Information; (III) Community Relations; (IV) Commission Relations; (V) Professionalism; (VI) Personal Traits and Interpersonal Skills; (VII) Special Projects.

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

### **RATING SYMBOLS**

Rating symbols are used to make assessments. They fall into four categories:

- 0 Unacceptable Performance
- 1 Below Expectations (performance has been below reasonable expectations)
- 2 Meets Expectations (performance has attained a level of reasonable expectation)
- 3 Exceeds Expectations (performance has been above reasonable expectations)

Each criteria should be rated and any specific comments or observations should be noted in the spaces provided for comments. The Special Projects section should contain the specific objectives selected for the particular performance period (usually annual).

**ADMINISTRATION:**

3	2	1	0	Managing Human Resources
	✓			Encourages Growth and Development of Subordinates
	-			Affirmative Action Compliance
	-			Provides an Equitable Personnel Evaluation System
	✓			Develops Coordination Among Subordinates
✓				Positively Motivates Subordinates

**Comments:**

I DO NOT HAVE ENOUGH OBSERVATION TO EVALUATE TWO ITEMS

3	2	1	0	Managing Financial Resources
✓				Does Effective Budget Planning and Preparation
✓				Effectively Manages Budget Execution and Fiscal Soundness
✓				Maintains a High Level of Productivity
✓				Provides Cost Effective Manpower Utilization

**Comments:**

3	2	1	0	
✓				<b>Managing Work Systems and Operations</b>
✓				Ability to Conceptualize Needs of The Organization / Town
✓				Ability to Organize Programs/Increase Efficiency and Effectiveness
✓				Displays Long-term Organizational Planning Skills
✓				Effectively Manages Delivery of Services to the Citizens
✓				Effectively Manages Change

**Comments:**

---



---



---

3	2	1	0	
✓				<b>Managing Information</b>
✓				Provides Concise and Understandable Written Reports
✓				Provides Effective Public Contact / Communication
✓				Agenda Preparation
✓				Verbal Presentation Skills

**Comments:**

---



---



---

**COMMUNITY RELATIONS:**

3	2	1	0	
✓				Accessible
	✓			Participates in Community Activities
✓				Effective Listener
✓				Promotes Credibility

**Comments:**

---

---

---

**COMMISSION RELATIONS:**

3	2	1	0	
✓				Accessible
✓				Responsive to Requests
✓				Communicates Effectively
✓				Impartial Among Commissioners
✓				Effective Listener
✓				Encourages Commission Involvement
✓				Demonstrates a High Level of Flexibility
✓				Receptive to Constructive Criticism and Advice

**Comments:**

---

---

---

**PROFESSIONALISM:**

3	2	1	0	Professional Conduct
✓				Execution of Commission Goals and Objectives
✓				Liaison with Other Agencies
	✓			News Media Relations
✓				Adherence to High Ethical Standards
	✓			Commitment to Goals of Profession

**Comments:**

---

---

---

---

**PERSONAL TRAITS AND INTERPERSONAL SKILLS:**

3	2	1	0	Leadership
✓				Setting a Proper Example
✓				Inspiring Cooperation
	✓			Delegating Responsibility

**Comments:**

---

---

---

---

3	2	1	0		<b>Judgment</b>
✓					Weighing Facts and Drawing Conclusions
✓					Using Foresight in Planning
✓					Making Reliable Decisions as Required
✓					Common Sense
✓					Tact and Diplomacy

**Comments:**

---



---



---

3	2	1	0		<b>Self-Confidence</b>
✓					Expression of Opinion
	✓				Competitive Spirit
✓					Poise Under Pressure

**Comments:**

---



---



---

3	2	1	0	
✓				<b>Open-Mindedness</b>
✓				Flexibility
✓				Fairness and Impartiality
✓				Receptiveness to Suggestions

**Comments:**

---



---



---

**SPECIAL PROJECTS:**

**Comments:**

*We are very fortunate*

---



---

Town of Longboat Key  
Town Manager Performance Evaluation

Evaluation period: November 1, 2011 to October 31, 2012

Commissioner L. Larson  
Governing Body Member's Name

Each member of the governing body should complete this evaluation form, sign it in the space below, and return it to Lisa Silvertooth. The deadline for submitting this performance evaluation is October 31, 2012. Evaluations will be summarized and included on the agenda for discussion at the Workshop to be held on November 12, 2012.

\_\_\_\_\_  
Mayor's Signature

\_\_\_\_\_  
Date

Lynn Larson  
Governing Body Signature

11-5-12  
Date Submitted

## **TOWN OF LONGBOAT KEY TOWN MANAGER PERFORMANCE EVALUATION**

**THIS PERFORMANCE EVALUATION SHOULD NOT BE CONSTRUED AS A CONTRACTUAL PROMISE, A CONTRACT OR COVENANT OF EMPLOYMENT, NOR IS IT A GUARANTEE OF EMPLOYMENT FOR ANY SPECIFIED LENGTH OF TIME. CONTINUED EMPLOYMENT IS ALWAYS AT THE TOWN COMMISSIONS DISCRETION.**

### **PURPOSE**

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

Specifically, the evaluation should serve the following needs:

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

### **INSTRUCTIONS**

Attached is the evaluation form for the Town Manager. It encompasses six primary areas: (I) Administration; (II) Managing Information; (III) Community Relations; (IV) Commission Relations; (V) Professionalism; (VI) Personal Traits and Interpersonal Skills; (VII) Special Projects.

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

### **RATING SYMBOLS**

Rating symbols are used to make assessments. They fall into four categories:

- 0 Unacceptable Performance
- 1 Below Expectations (performance has been below reasonable expectations)
- 2 Meets Expectations (performance has attained a level of reasonable expectation)
- 3 Exceeds Expectations (performance has been above reasonable expectations)

Each criteria should be rated and any specific comments or observations should be noted in the spaces provided for comments. The Special Projects section should contain the specific objectives selected for the particular performance period (usually annual).

**ADMINISTRATION:**

3	2	1	0	Managing Human Resources
X				Encourages Growth and Development of Subordinates
✓				Affirmative Action Compliance
X				Provides an Equitable Personnel Evaluation System
X				Develops Coordination Among Subordinates
X				Positively Motivates Subordinates

**Comments:**

---



---



---

3	2	1	0	Managing Financial Resources
X				Does Effective Budget Planning and Preparation
X				Effectively Manages Budget Execution and Fiscal Soundness
X				Maintains a High Level of Productivity
X				Provides Cost Effective Manpower Utilization

**Comments:**

---



---



---

3	2	1	0	<b>Managing Work Systems and Operations</b>
X				Ability to Conceptualize Needs of The Organization / Town
X				Ability to Organize Programs/Increase Efficiency and Effectiveness
X				Displays Long-term Organizational Planning Skills
X				Effectively Manages Delivery of Services to the Citizens
X				Effectively Manages Change

**Comments:**

---



---



---

3	2	1	0	<b>Managing Information</b>
X				Provides Concise and Understandable Written Reports
X				Provides Effective Public Contact / Communication
X				Agenda Preparation
X				Verbal Presentation Skills

**Comments:**

---



---



---

**COMMUNITY RELATIONS:**

3	2	1	0	
X				Accessible
X				Participates in Community Activities
X				Effective Listener
X				Promotes Credibility

**Comments:**

---



---



---

**COMMISSION RELATIONS:**

3	2	1	0	
X				Accessible
X				Responsive to Requests
X				Communicates Effectively
X				Impartial Among Commissioners
X				Effective Listener
X				Encourages Commission Involvement
X				Demonstrates a High Level of Flexibility
X				Receptive to Constructive Criticism and Advice

**Comments:**

---



---



---

**PROFESSIONALISM:**

3	2	1	0	Professional Conduct
X				Execution of Commission Goals and Objectives
X				Liaison with Other Agencies
X				News Media Relations
X				Adherence to High Ethical Standards
X				Commitment to Goals of Profession

**Comments:**

---

---

---

---

**PERSONAL TRAITS AND INTERPERSONAL SKILLS:**

3	2	1	0	Leadership
X				Setting a Proper Example
X				Inspiring Cooperation
X				Delegating Responsibility

**Comments:**

---

---

---

---

3	2	1	0	Judgment
X				Weighing Facts and Drawing Conclusions
X				Using Foresight in Planning
X				Making Reliable Decisions as Required
X				Common Sense
X				Tact and Diplomacy

**Comments:**

---



---



---

3	2	1	0	Self-Confidence
X				Expression of Opinion
X				Competitive Spirit
X				Poise Under Pressure

**Comments:**

---



---



---

3	2	1	0	
X				Flexibility
X				Fairness and Impartiality
X				Receptiveness to Suggestions

**Open-Mindedness**

**Comments:** Mr. Bullock is a pleasure to work with. He does an excellent job managing town resources. He has exceeded my expectations.

**SPECIAL PROJECTS:**

**Comments:**

---



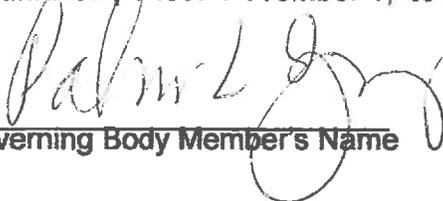
---



---

Town of Longboat Key  
Town Manager Performance Evaluation

Evaluation period: November 1, 2011 to October 31, 2012

  
Governing Body Member's Name

Each member of the governing body should complete this evaluation form, sign it in the space below, and return it to Lisa Silvertooth. The deadline for submitting this performance evaluation is October 31, 2012. Evaluations will be summarized and included on the agenda for discussion at the Workshop to be held on November 12, 2012.

PLEASE SEE ATTACHED.

\_\_\_\_\_  
Mayor's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Governing Body Signature

\_\_\_\_\_  
Date Submitted

## **TOWN OF LONGBOAT KEY TOWN MANAGER PERFORMANCE EVALUATION**

**THIS PERFORMANCE EVALUATION SHOULD NOT BE CONSTRUED AS A CONTRACTUAL PROMISE, A CONTRACT OR COVENANT OF EMPLOYMENT, NOR IS IT A GUARANTEE OF EMPLOYMENT FOR ANY SPECIFIED LENGTH OF TIME. CONTINUED EMPLOYMENT IS ALWAYS AT THE TOWN COMMISSIONS DISCRETION.**

### **PURPOSE**

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

Specifically, the evaluation should serve the following needs:

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

### **INSTRUCTIONS**

Attached is the evaluation form for the Town Manager. It encompasses six primary areas: (I) Administration; (II) Managing Information; (III) Community Relations; (IV) Commission Relations; (V) Professionalism; (VI) Personal Traits and Interpersonal Skills; (VII) Special Projects.

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

### **RATING SYMBOLS**

Rating symbols are used to make assessments. They fall into four categories:

- 0 Unacceptable Performance
- 1 Below Expectations (performance has been below reasonable expectations)
- 2 Meets Expectations (performance has attained a level of reasonable expectation)
- 3 Exceeds Expectations (performance has been above reasonable expectations)

Each criteria should be rated and any specific comments or observations should be noted in the spaces provided for comments. The Special Projects section should contain the specific objectives selected for the particular performance period (usually annual).

**ADMINISTRATION:**

3	2	1	0	
	✓			<b>Managing Human Resources</b>
				Encourages Growth and Development of Subordinates
				Affirmative Action Compliance ?
				Provides an Equitable Personnel Evaluation System ?
	✓			Develops Coordination Among Subordinates
				Positively Motivates Subordinates ?

**Comments:** I FIND THIS DIFFICULT TO ASSESS BECAUSE I DON'T HAVE PERSONAL KNOWLEDGE OF THESE FUNCTIONS.

3	2	1	0	
				<b>Managing Financial Resources</b>
✓				Does Effective Budget Planning and Preparation
✓				Effectively Manages Budget Execution and Fiscal Soundness
✓				Maintains a High Level of Productivity
	✓			Provides Cost Effective Manpower Utilization

**Comments:** THE BUDGET PROCESS THIS YEAR WAS MUCH MORE EFFICIENT THAN IN PAST YEARS, DUE TO MR BULLOCK'S WORK WITH THE FINANCE DIRECTOR TO BRING US THE INFORMATION WE NEEDED

3	2	1	0	Managing Work Systems and Operations
✓				Ability to Conceptualize Needs of The Organization / Town
	✓			Ability to Organize Programs/Increase Efficiency and Effectiveness
✓				Displays Long-term Organizational Planning Skills
	✓			Effectively Manages Delivery of Services to the Citizens
✓				Effectively Manages Change

**Comments:** MR. BULLOCK HAS QUICKLY FAMILIARIZED HIMSELF WITH ALL OF THE DIVERSE ASPECTS OF THE LAK COMMUNITY, WHICH MAKES HIM A VERY EFFECTIVE MANAGER & COMMUNICATOR

3	2	1	0	Managing Information
	✓			Provides Concise and Understandable Written Reports
✓				Provides Effective Public Contact / Communication
✓				Agenda Preparation
	✓			Verbal Presentation Skills

**Comments:** <sup>EXAMPLE —</sup> MR. BULLOCK'S PREPARATION OF AGENDAS & INFORMATION FOR THE COMMISSION REGARDING THE PENSION DISCUSSIONS HAS BEEN EXCELLENT.

**COMMUNITY RELATIONS:**

3	2	1	0	
✓				Accessible
✓				Participates in Community Activities
✓				Effective Listener *
✓				Promotes Credibility

Comments: SEE ATTACHED

**COMMISSION RELATIONS:**

3	2	1	0	
✓				Accessible
✓				Responsive to Requests
✓				Communicates Effectively
				Impartial Among Commissioners (7)
✓				Effective Listener
✓				Encourages Commission Involvement
✓				Demonstrates a High Level of Flexibility
✓				Receptive to Constructive Criticism and Advice *

Comments: \* EXAMPLE: CONCERNS & CRITICISM ST  
 RESPONSE ON NORTH SIDE DURING WIND STORM - NOT  
 REPLY HIS FEEL - WERE TAKEN TO HEART, WITH  
 NO DEFENSIVENESS ON HIS PART. HE WANTED TO DO  
 BETTER & DID - DURING THE NEXT STORM

**PROFESSIONALISM:**

3	2	1	0	Professional Conduct
	✓			Execution of Commission Goals and Objectives
✓				Liaison with Other Agencies
	✓			News Media Relations
✓				Adherence to High Ethical Standards
✓				Commitment to Goals of Profession

**Comments:** MR BUNDOCK'S DIVERSE PROFESSIONAL BACKGROUND HAS MADE HIM AWARE OF WHAT IS NEEDED TO MANAGE WITH A HIGH DEGREE OF FIRMNESS & HONESTY

**PERSONAL TRAITS AND INTERPERSONAL SKILLS:**

3	2	1	0	Leadership
✓				Setting a Proper Example
✓				Inspiring Cooperation
?				Delegating Responsibility ?

**Comments:** ? DIGGING FROM THE INFORMATION MR BUNDOCK PRESENTS US WITH I HAVE TO ASSUME THAT OTHER DEPARTMENTS ARE DOING WHAT THEY SHOULD -

3	2	1	0	Judgment
	✓			Weighing Facts and Drawing Conclusions
✓	<del>✓</del>			Using Foresight in Planning
	✓			Making Reliable Decisions as Required
✓				Common Sense
✓				Tact and Diplomacy

**Comments:**

---



---



---

3	2	1	0	Self-Confidence
✓				Expression of Opinion
✓				Competitive Spirit
✓				Poise Under Pressure

**Comments:**

---



---



---

3	2	1	0	
				<b>Open-Mindedness</b>
✓				Flexibility
✓				Fairness and Impartiality
✓				Receptiveness to Suggestions

**Comments:**

---



---



---

**SPECIAL PROJECTS:**

**Comments:** SEE ATTACHED

---



---



---

There is nothing satisfactory about this evaluation form -- it is more suitable for evaluating an appliance (say a washer or dryer) than a human being.

I would hope that the Commission can discuss this and arrive at a more meaningful way to evaluate the town manager's performance.

For instance, an essay on some aspects of the manager's performance -- not just a "comment" -- would be more appropriate. For example, for all the years I have lived at the north end of Longboat Key, I have complained about the lack of street lights at the corner of Broadway and GMD (and the next corner) during turtle season. Mr. Bullock listened to my concerns, and for the first time something constructive and permanent will be done about the problem -- and there will be lights during turtle season.

It is hard to get a sense from this evaluation form of the fairness, good judgement, and very hard work that Mr. Bullock brings to this job of town manager. Apparently each Commissioner could discuss Mr. Bullock's performance with each department head in order to help judge his effectiveness in working with his staff, but I am not comfortable with that.

There has to be a better way to do this.

Pat Zunz

Town of Longboat Key  
Town Manager Performance Evaluation

Evaluation period: November 1, 2011 to October 31, 2012

PHIL YOUNGER  
Governing Body Member's Name

Each member of the governing body should complete this evaluation form, sign it in the space below, and return it to Lisa Silvertooth. The deadline for submitting this performance evaluation is October 31, 2012. Evaluations will be summarized and included on the agenda for discussion at the Workshop to be held on November 12, 2012.

\_\_\_\_\_  
Mayor's Signature

\_\_\_\_\_  
Date

Phil Younger  
Governing Body Signature

11-05-12  
Date Submitted

## **TOWN OF LONGBOAT KEY TOWN MANAGER PERFORMANCE EVALUATION**

THIS PERFORMANCE EVALUATION SHOULD NOT BE CONSTRUED AS A CONTRACTUAL PROMISE, A CONTRACT OR COVENANT OF EMPLOYMENT, NOR IS IT A GUARANTEE OF EMPLOYMENT FOR ANY SPECIFIED LENGTH OF TIME. CONTINUED EMPLOYMENT IS ALWAYS AT THE TOWN COMMISSIONS DISCRETION.

### **PURPOSE**

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

Specifically, the evaluation should serve the following needs:

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

### **INSTRUCTIONS**

Attached is the evaluation form for the Town Manager. It encompasses six primary areas: (I) Administration; (II) Managing Information; (III) Community Relations; (IV) Commission Relations; (V) Professionalism; (VI) Personal Traits and Interpersonal Skills; (VII) Special Projects.

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

### **RATING SYMBOLS**

Rating symbols are used to make assessments. They fall into four categories:

- 0 Unacceptable Performance
- 1 Below Expectations (performance has been below reasonable expectations)
- 2 Meets Expectations (performance has attained a level of reasonable expectation)
- 3 Exceeds Expectations (performance has been above reasonable expectations)

Each criteria should be rated and any specific comments or observations should be noted in the spaces provided for comments. The Special Projects section should contain the specific objectives selected for the particular performance period (usually annual).

**ADMINISTRATION:**

3	2	1	0	Managing Human Resources
W				Encourages Growth and Development of Subordinates
	2			Affirmative Action Compliance
W				Provides an Equitable Personnel Evaluation System
W				Develops Coordination Among Subordinates
W				Positively Motivates Subordinates

**Comments:**

---



---



---

3	2	1	0	Managing Financial Resources
W				Does Effective Budget Planning and Preparation
W				Effectively Manages Budget Execution and Fiscal Soundness
W				Maintains a High Level of Productivity
W				Provides Cost Effective Manpower Utilization

**Comments:**

*EXCELLENT FISCAL MANAGEMENT*

---



---



---

3	2	1	0	
				<b>Managing Work Systems and Operations</b>
W				Ability to Conceptualize Needs of The Organization / Town
W				Ability to Organize Programs/Increase Efficiency and Effectiveness
W				Displays Long-term Organizational Planning Skills
W				Effectively Manages Delivery of Services to the Citizens
W				Effectively Manages Change

**Comments:**

---



---



---

3	2	1	0	
				<b>Managing Information</b>
W				Provides Concise and Understandable Written Reports
W				Provides Effective Public Contact / Communication
	2			Agenda Preparation
W				Verbal Presentation Skills

**Comments:**

---



---



---

**COMMUNITY RELATIONS:**

3	2	1	0	
	2			Accessible
	2			Participates in Community Activities
3				Effective Listener
3				Promotes Credibility

**Comments:**

---



---



---

**COMMISSION RELATIONS:**

3	2	1	0	
W				Accessible
W				Responsive to Requests
W				Communicates Effectively
.	2			Impartial Among Commissioners
W				Effective Listener
	2			Encourages Commission Involvement
W				Demonstrates a High Level of Flexibility
W				Receptive to Constructive Criticism and Advice

**Comments:**

---



---



---

**PROFESSIONALISM:**

3	2	1	0	Professional Conduct
	2			Execution of Commission Goals and Objectives
3				Liaison with Other Agencies
	2			News Media Relations
3				Adherence to High Ethical Standards
3				Commitment to Goals of Profession

**Comments:**

---



---



---

**PERSONAL TRAITS AND INTERPERSONAL SKILLS:**

3	2	1	0	Leadership
3				Setting a Proper Example
3				Inspiring Cooperation
	2			Delegating Responsibility

**Comments:**

---



---



---

3	2	1	0	Judgment
W				Weighing Facts and Drawing Conclusions
W				Using Foresight in Planning
W				Making Reliable Decisions as Required
W				Common Sense
W				Tact and Diplomacy

**Comments:**

---



---



---



---

3	2	1	0	Self-Confidence
W				Expression of Opinion
W				Competitive Spirit
W				Poise Under Pressure

**Comments:**

---



---



---



---

3	2	1	0	Open-Mindedness
5				Flexibility
	2			Fairness and Impartiality
5				Receptiveness to Suggestions

**Comments:**

---



---



---



---

**SPECIAL PROJECTS:**

**Comments:**

---



---



---



---



**End of Agenda Item**