

## Memorandum

**TO:** Town Commission  
**FROM:** Tom Harmer, Town Manager  
**REPORT DATE:** September 16, 2020  
**MEETING DATE:** October 5, 2020  
**SUBJECT:** Town Manager Annual Evaluation

### Background

In accordance with Article 7 (Annual Review) of my employment contract, "The Town Commission may review and evaluate the job performance of Employee at least once annually on or before September 15 of each year of the Agreement."

My first evaluation was scheduled for the December 3, 2018 Regular Meeting to coincide with the completion of my first year. Last year it was moved up one month to the November 4, 2019 Regular Meeting with a plan to ultimately end up with September evaluations. I have scheduled this year's evaluation for the October 5, 2020 Regular Meeting continuing the shift to the September date.

Last year the evaluation form was updated based on recommended evaluation criteria developed by the Florida City/County Manager's Association. Commissioners were provided the same form again this year for use in the annual evaluation. I have also attached a one-page highlight of activities over the past year.

The Town Manager contract states that "The Town Commission may, but is not required to increase Employee's salary based on performance following annual review or as deemed appropriate by the Commission. Such salary increases, if any, shall become the new annual base salary under this Agreement without necessity of amending this Agreement." This has been a very unusual year and there are still some financial unknowns for the Town going into FY21 related to COVID-19 and the economy. Based on these uncertainties, I am requesting the Town Commission take no action regarding potential salary increases for the Town Manager this year.

I am available to meet with each Commissioner to discuss your evaluation in advance of the meeting. When you have completed your evaluation, please return them to Assistant to Town Manager Susan Phillips so they can be included in the agenda packet. If your evaluation forms are received by Monday, September 28, they will be included in the agenda materials for the October 5, 2020 Regular Meeting. (Individual Commissioner evaluations are available upon request in the Town Clerk's Office.)

The Town Attorney evaluation is also being scheduled for the October 5, 2020 Regular Meeting. You will receive her evaluation form separately and they should also be submitted to Susan for inclusion in the agenda packet.

The Town Attorney's contract includes an annual hourly rate increase based on a CPI established by the Bureau of Labor Statistics Southeastern Regional Office. However, due to the impacts of the COVID-19 pandemic, Maggie has advised her firm will not be increasing rates this year.

If you have any questions regarding the evaluation process, please contact me.

### Attachments

- A. Evaluation Form
- B. 2020 Highlights

**Longboat Key, Florida  
Town Manager Performance Evaluation**

**Town Manager:** \_\_\_\_\_

**Commissioner:** \_\_\_\_\_

**Evaluation Period:** \_\_\_\_\_

**Evaluation Date:** \_\_\_\_\_

**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.

**Rating Scale**

A space has been provided for each performance area to include your comments. Each Commissioner 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.

Ratings 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).

**Performance Categories:**

1. **Professional Skills and Expertise** Overall Rating: \_\_\_\_\_ (3, 2, 1, or 0)
- a. Is knowledgeable of current developments affecting the management field and affecting local governments.
  - b. Regularly provides accurate, comprehensive reports concerning matters of importance to the organization.
  - c. Anticipates problems and develops effective approaches for solving them.
  - d. Offers workable alternatives when changes in the law render the administration of an ordinance or policy impractical.
  - e. Sets a professional example by handling the affairs of the organization in a fair and impartial manner.

**Comments:**

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2. **Commission Relations** Overall Rating: \_\_\_\_\_ (3, 2, 1, or 0)
- a. Carries out directives of the Commission as a whole rather than those of any one Commission member.
  - b. In responding to requests for information, provides complete, accurate, and timely information equally to all Commission members.
  - c. Assists the Commission by resolving problems at the administrative level to avoid unnecessary Commission action.
  - d. Assists the Commission in establishing policy while acknowledging the ultimate authority of the Commission.
  - e. Is willing to try new ideas proposed by Commission members.

**Comments:**

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3. **Citizen and Public Relations** Overall Rating: \_\_\_\_\_ (3, 2, 1, or 0)
- a. Effectively conveys to the public that the organization delivers services in a cost-effective manner without sacrificing quality and customer focus.
  - b. Is willing to meet with members of the community and is responsive to their concerns.
  - c. Demonstrates a dedication to service to the community and its citizens.
  - d. Expresses information orally in a clear and concise manner when making public presentations.
  - e. Is skillful with the news media, proactively providing information that is important to the public.

**Comments:**

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**4. Policy Execution**

Overall Rating: \_\_\_\_\_ (3, 2, 1, or 0)

- a. Understands, supports, and enforces the organization's ordinances, polices, and procedures.
- b. Clearly identifies and communicates expectations to the organization regarding the implementation of polices enacted by the Board.
- c. Implements Commission actions in accordance with the intent of the Commission.
- d. Supports the actions of the Commission after a decision has been reached, both inside and outside the organization.
- e. Helps internal and external stakeholders to achieve common objectives within the parameters of established Commission policies.

**Comments:**

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**5. Intergovernmental Relations**

Overall Rating: \_\_\_\_\_ (3, 2, 1, or 0)

- a. Promotes a positive working relationship with other governmental entities.
- b. Engages with other local, regional, State, and Federal agencies to accomplish local initiatives.
- c. Positively and effectively represents the organization and its interests when working with other governmental agencies.
- d. Maintains awareness of laws and other issues affecting other governmental agencies which may affect the organization
- e. Is willing to share resources or information with other governmental agencies as appropriate.

**Comments:**

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**6. Staffing and Management**

Overall Rating: \_\_\_\_\_ (3, 2, 1, or 0)

- a. Recruits and retains competent personnel for Town positions.
- b. Is aware of staff weaknesses and works to improve their performance.
- c. Promotes training and development opportunities for employees at all levels of the organization.
- d. Stays accurately informed and concerned about employee relations.
- e. Is able to discern when it is necessary to assume charge of situations that would normally be handled by a subordinate and when it is necessary to only provide guidance and support.

**Comments:**

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**7. Fiscal Management** Overall Rating: \_\_\_\_\_ (3, 2, 1, or 0)

- a. Prepares a balanced budget to provide services at a level directed by the Commission.
- b. Ensures that the budget meets the operational needs of the organization and makes the best possible use of available funds.
- c. Prepares the budget in an intelligent readable format.
- d. Submits the proposed budget in a timely manner that allows for an appropriate review period.
- e. Appropriately monitors and manages the fiscal activities of the organization throughout the fiscal year.

**Comments:**

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**8. Planning/Organizational Development** Overall Rating: \_\_\_\_\_ (3, 2, 1, or 0)

- a. Works with the Commission, community leaders, and other stakeholders to develop a clear vision, mission, values, and objectives for the organization.
- b. Effectively prioritizes goals and objectives in order to ensure that the organization is doing “first things first” in support of its strategic plan.
- c. Maintains a healthy and productive organizational culture focused on customer services and responsible stewardship of the organization’s resources.
- d. Has a capacity for and encourages innovation.
- e. Reviews ordinances, policies, and procedures periodically to suggest improvements.

**Comments:**

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**9. Leadership and Decision-Making** Overall Rating: \_\_\_\_\_ (3, 2, 1, or 0)

- a. Leads the organization by example in adhering to its established policies, rules and procedures, and ensures that subordinates do the same.
- b. Acknowledges the efforts of others and gives appropriate credit for their accomplishments.
- c. Is effective at building consensus among stakeholders on new or unpopular policies or initiatives.
- d. Makes logical decisions based on a thorough review of available information and soliciting input from appropriate sources.
- e. Is able to effectively make decisions rapidly in situations where information is limited and the outcome might be uncertain.

**Comments:**

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**10. Individual Characteristics**

Overall Rating: \_\_\_\_\_ (3, 2, 1, or 0)

- a. Consistently acts with professionalism and courtesy, including prompt attendance at meetings, returning phone calls/messages, and adhering to scheduled appointments.
- b. Ensures that all business conducted by the organization is free of conflicts of interest, or practices that might be construed as illegal, unethical, or unprofessional.
- c. Is energetic, cooperative, and willing to spend whatever time is necessary to do a good job.
- d. Has the capacity to listen to others and to recognize their interests.
- e. Avoids political positions, partisanship, and unnecessary controversy.

**Comments:**

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**Summary:**

<u>Performance Dimension</u>	<u>Overall Rating</u>
1. Professional Skills and Expertise	_____
2. Commission Relations	_____
3. Citizen and Public Relations	_____
4. Policy Execution	_____
5. Intergovernmental Relations	_____
6. Staffing and Management	_____
7. Fiscal Management	_____
8. Planning and Organizational Development	_____
9. Leadership and Decision Making	_____
10. Individual Characteristics	_____

Total Score: \_\_\_\_\_

**Total Average Rating:** \_\_\_\_\_

**Overall Comments:**

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**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_



## TOWN OF LONGBOAT KEY

## FY20 Annual Highlights

- FY19 Annual Financial Audit Certificate of Excellence and no management comments
- Returned \$1.7 million to General Fund (from FY19)
- All reserve policies met
- Adopted updated Beach Management Plan
- Negotiated a \$2.69M commitment from Manatee County for North end beach projects
- Voter approval of \$34.5 million Beach Bond authorization
- Bond Validation of Beach Bonds
- Conducted Town Charrette for Town Center Property
- Town Center concept plan adopted
- Conducted tree lighting and first concert at outdoor venue at Town Center
- Completed Phase 1 of outdoor venue at Town Center
- Funding approved for Phase 2 of outdoor venue at Town Center
- Conducted 1st annual Citizen Survey
- Published 2nd Annual Report
- Negotiated revised Maintenance of Traffic Plan for US41/Gulfstream Roundabout
- Hosted the Annual Community Open House
- 2<sup>nd</sup> Annual Citizen's Academy series
- Added 2 new pickleball courts to Bayfront Park
- Conducted a third-party cyber security assessment
- Finalized new Strategic Plan and 2020-2021 initiatives
- Initiated on-line permitting and inspections program
- Received awards of \$103,800 (Police) and \$32,205 (Fire) in WCIND Grant Funding.
- Received award of \$44,932 from the FDLE for a COVID-19 Grant (2020 Coronavirus Emergency Supplemental Funding)
- New 3-year PBA contract
- Revised Library Lease
- Improved communication and coordination efforts with Manatee County through an initiated joint meeting between LBK and Manatee County Directors



## TOWN OF LONGBOAT KEY

- Successfully negotiated the Guaranteed Maximum Price (“GMP”) contracts for the renovation of Fire Station 91 and the new construction of Fire Station 92, held the groundbreaking ceremony, and initiated construction.
- Undergrounding Project: On schedule and within budget. Completing all underground FPL conduits, conductors, and transformer installs in Phase 1 Country Club Shores in preparation for switch orders. Kicked-off Redundant Subaqueous Wastewater Force Main Permitting project in early 2020.
- Discovered, coordinated and repaired leak in Town’s Subaqueous Wastewater Force Main in approximately 30-hours.
- Full Town participation with Sarasota County for Surtax IV preparation/marketing effort.
- Obtained formal FDOT approval for roundabout intersection control at the Broadway/Gulf of Mexico Drive (SR 789) intersection
- Updated Building and Fire Fees Resolution implementation
- Completed Telecommunications/Smart Pole Ordinance changes related to Undergrounding Project & aesthetics.
- Completed multiple batches of Zoning Text Amendments (Zoning determinations, commercial revitalization parking standards, pickleball, docks, telecommunications/smart poles, swimming pool standards, restaurant parking ratios).
- Completed proposed parking and traffic ordinance changes and Commission Workshops discussions related to Longbeach Village; including facilitation of neighborhood input.
- Developed and launched new on-line Interactive Zoning Map
- Launched on-line records request platform to track and expedite public records requests
- Completed annual Commission District audit with no redistricting required
- Installed two kiosks in Town Hall: Information Station with digitized documents available to public; and a Sarasota County Library kiosk for residents to utilize digital library services
- Managed COVID-19 response and implemented virtual meeting format to maintain Commission and advisory board functions during pandemic



**End of Agenda Item**