

M E M O R A N D U M

TO: Town Commission
FROM: Tom Harmer, Town Manager
REPORT DATE: October 16, 2019
MEETING DATE: November 4, 2019
SUBJECT: Annual Evaluation of Town Manager

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."

Last year I scheduled The Town Manager's evaluation for the December 3, 2018 Regular Meeting to coincide with the completion of my first year. In an effort to ultimately end up with September evaluations I have scheduled this year's evaluation for the November 4, 2019 Regular Meeting. That will allow for almost a complete year but continue to shift it closer to the September date.

Last year there was some discussion about the criteria to rate the Manager. To address those comments, I have updated the evaluation form based on recommended evaluation criteria developed by the Florida City/County Manager's Association. I discussed the new form and criteria with the Mayor and he has indicated support for the new format. I have also attached a one-page highlight of activities over the past 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 compiled for the agenda packet. If your evaluation forms are received by October 28, they will be included in the agenda materials for the November 4, 2019 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 November 4, 2019 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. The increase for this fiscal year is 1.5% and automatically went into effect on October 1.

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."

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

Attachments

- A. Evaluation Form
- B. 2019 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:

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:

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:

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:

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:

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:

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:

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:

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

- a. Leads the organization by example in adhering to its established polices, 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:

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:

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:

Signature: _____ **Date:** _____



- **FY18 Comprehensive Annual Financial Report Issued- *No reportable conditions***
- **Adoption of FY20 Budget and 5 Year Capital Improvement Plan**
 - *Operating Millage Flat, and GF Reserves exceed target*
- **Charter Amendment approved- Three Year Commission Terms**
- **Published first Town Annual Report**
- **Conducted first annual strategic planning retreat with Town Commission**
- **Implemented new Citizens Academy of Government**
- **Transitioned to Code Enforcement Special Magistrate**
- **Undergrounding Project- *Started construction***
- **Comprehensive Beach Management Plan- *Approved***
- **Received State permit for north end groins project**
- **Completed major utility and street resurfacing project in Emerald Harbor**
- **Completed irrigation and court replacement at Tennis Center for Courts 1, 2, & 3**
- **Received FDEP Grant to fund Initial Sea Level Rise Phase 2 work (Stormwater Atlas)**
- **Installed WaStop valves in Village (7)**
- **Conducted Planning & Zoning Board training**
- **Installed New Audio System in Commission Chambers**
- **Installed New Camera System in Commission Chambers for in-house live streaming capability**
- **Demolition of former Amore Restaurant- *Completed***
- **Received Water Management District Permit for Outdoor Venue site work**
- **Certificate of Built Conditions Program adopted for non-conforming properties**
- **Non-Conforming Properties Code Updated (CORD)**
- **Zoning Code Rewrite/Reformat adopted by Commission**
- **Emergency Management Agreement with both counties- *Approved***
- **Held annual Community Open House**
- **Hosted annual Town Hall Artist Reception**
- **Completed Building/Fire Fee Study- *Commission adopted new fee schedule***
- **Implemented initial phase of on-line permitting program**
- **Implemented ADA compliance process/successfully worked with counsel to defend related litigation**
- **Worked with Town Attorney to successfully pursue short term rental ordinance violation in court**

End of Agenda Item