A. CALL TO ORDER: Vice Chair Mayor Cubillos called the Administration & Finance committee meeting to order at 10:30am.

B. MOMENT OF SILENT MEDITATION & PLEDGE OF ALLEGIANCE: Vice Chair asked the moment of silent meditation & the pledge of allegiance.

C. ROLL CALL:

Present: Councilperson Harold E. Mathis, Jr., Chairperson (Late)
Mayor Claudia V. Cubillos, Vice Chair
Councilperson Vimari Roman, Member

Also present: David Rosemond, Village Manager
Councilperson Dreher

Not present: Yenise Jacobi, Village Clerk

D. APPROVAL OF AGENDA: The Vice-Chair asked for any additions or amendments to the Agenda. Vice Chair asked for agenda approval with additions. Councilperson Roman motioned, and Vice Chair Cubillos second. The motion carried unanimously.

E. APPROVAL OF MINUTES: Moved to the next committee meeting for some additional additions.

F. GOOD & WELFARE: None noted.

Note: Vice Chair Cubillos stated that another email was received last night and it was unfortunate that they find themselves in these circumstances right now it almost feels like force of the hand for the record meeting was originally on July 15th and on July 14th she received an email threatening her and husband her livelihood, everything of what she was as an elected official. She went ahead and read the email received from the Village Manager on the record and stated that she is not clear if that is why the third member of the committee is not present but as a form of government we can’t continue to operate like this. My concerns are as a stated before if you feel something is wrong you are in your right to say something but to send an email with the intend to extort it is not right.
For the record these evaluations were done way before any of this began to occur, they were done months before, what I have read are not in any way bad. For the record the evaluations were due May 25 and were turned in a week before the Administration & Finance meeting for the July 11th meeting.

G. AGENDA ITEMS:
   G1. Evaluations (Attorney & Village Manager)
   G1a. Village Manager Review Results of Evaluation

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<th>Question #</th>
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Please note: Numbers were calculated and provided by Councilwoman Roman

Vice Chair Cubillos mentioned areas of concerns and lowest score across the board relations with Governing Body was low and it is an area which deals directly with the Mayor & Village Council she also stated that it is our job to set the mission and vision and it is the manager's job to make sure that mission and vision is carried through based on the on wish and the will of the council. It is an area which needs to be addressed how the committee and the council choses to move forward with that area.

G1b. Mayor Cubillos stated that since Attorney Geller was not present his evaluation will not be done until he is present giving him the courtesy to be present.

G1c. Mayor Cubillos stated that the notes from this meeting on numbers to be provided to the Clerk and if there are any corrections over the math the council can discuss at full council meeting.

G1d. Chairperson Mathis, Jr. has arrived late and Mayor Cubillos has briefed him on what they have gone over and how they came to the average.

G1e. Chairperson Mathis, Jr. said that we have to be consistent and that we all gave a fair assessment especially in this committee because it all begins here and regardless
of what happens the residents look at us, they put us up here no matter who goes in
works in the office I think as a committee we did a good job. When the numbers come
out at the end it was average and I think we did a fair job. Chairperson Mathis, Jr stated
that he would look to hear from the rest of the committee on their input on how to go
forward and complete the evaluations.

G1f. Councilperson Roman stated that it is difficult to give an opinion because this is her
first time sitting on a council and things are done differently. She is opening it to what
ideas Chair Mathis, Jr. came up with and giving her feedback.

G1g. Vice Chair Cubillos stated that evaluating is one of the toughest things any leader
has to do. No one ever wants to tell anyone that they think they are average because at
the end of the day if we found ourselves eating ice cream we all would have a great
conversation because I would like to believe everyone here has real good intent to do
what is right for the greater good if not we would not be in public service. At the end of
the day as leaders you are not going to make everyone happy because you have to be
fair and you have to be sincere. From my perspective I was as sincere as I could be and
I was very clear explaining it on my notes. As I was going to through the evaluation, I
met with David and had coffee because I wanted it to have a fair meeting and I wanted
to have a meeting before I did this, which is why I turned mine late. What I realized
when you are the CEO things are not easy, I don’t think that David Rosemond is a bad
person or a bad leader. It is a big different to be a middle manager and being the CEO
you have to handle numerous departments. Although we have received two unfortunate
emails these evaluations were done way before we got those emails. So in no way
shape or form there is any retaliation from me. These are hard decisions and we are
here to make them. I applaud the chair for the evaluations it made me have to think and
meet with David. I didn’t take it lightly I did it with a sincere heart in my hand but also as
the Mayor it is hard to do that. Where we go from here, I would like to see what Vice
Mayor Nickerson and Councilperson Dreher were thinking if he is in a five level and we
see him as a two then there is something missing. I am involved in a lot of the emails
so I see more I am aware of more on a day to day basis. The current administration the
Village Clerk and Village Manager has been very eloquent in reminding us how poor the
administration was before they remind us via email and they remind us on the record. I
also did the evaluation as someone who has been elected for nine years and what the
need of the village is to move the Village Forward.

G1h. Councilperson Roman states that each of the sections were read but the
comments were not discussed and they were eye opening. She saw that Councilperson
Dreher didn’t have any comments and find out from him what his thoughts are. She like
to go over the narrative, although this is her first time in government she has a lot of
leadership she is actually a strategic leadership intervention coach. I want it to put on
the record again that the clerk’s evaluation needs to be done it is important, and since
we are going in a different direction we may need to make additional changes in order to move forward.

G1i. Manager David Rosemond states that he was concerned that the issues of the email were lump together and he stated he had nothing to do with the first email, and he had as of yet received a copy of his evaluation. He also stated that he was not happy with his performance, as he had not been able to align all of the arrows of this organization as he hope he would have. He would have given himself a score below three for that reason.

G1j. Councilperson Roman said she had a comment, tells Manager Rosemond that he states he said he wasn’t happy with his performance, one of the first thing she did when she came to council sit with him she was excited because she saw his passion and ideas she liked his ideas. She hasn’t seen any of that come to fruition. She is thinking of it as a resident and what she would do in her day to day. She thinks he was perfect for the time he came in and he served your purpose, she doesn’t think he is the right person to move forward. Her opinion is she doesn’t know how they are moving forward but she doesn’t think they have the right manager in place. He just sat there and said he wasn’t happy with his performance. How long do you give? This is the CEO of the Village. My intuition is that we don’t have the right individual in place.

G1k. Chairperson Mathis, Jr. when I was preparing all three evaluations I didn’t want it to be cut and paste sort to speak there are three different positions and need to look at what they are. The evaluations look at the position there is no grey areas, everyone except for one particular councilperson turned theirs in late. Means we took our time and really did the evaluation. After receiving the email last night I spoke to my council and was told not to speak on it there is stuff going on to reiterate what the Mayor said these evaluations were made before we received any of these emails. Policy and directives and procedures evaluations how we should go from here on as a body. Evaluations are in place to be a tool that we all used on corrective and constructive feedback about performances of individual it is a two way street it works that way. They are also in place to set clear and concise performance standards which is what we are doing. To ensure that this performance standards reflect the key area that the employee is hire to do. That goes back that people are in a position that they don’t know what they are supposed to do and that is not right. It also is used in combine in resource they need to better themselves not only to better the city. These are just rough points from the manual. I think we need to come up with a numbering system to how we fair us as a governing body when it comes how we critique our performances because there were certain words mentioned in emails as far as retaliation as so forth. I get up and go to work every day I am not perfect I make mistakes and I have been evaluated and I have had bad evaluations but I work for someone they know what they want. This is tough
and it is more difficult because of what is going on. Evaluation process shouldn't take very long.

Gl. Mayor Cubillos stated that something that was told her at the League meeting, we have a manager, clerk and attorney that works for the council because we work for the people. The clerk is here to ensure she maintains the records so all the public request or responded in a timely manner. The attorney is here to ensure that the village is not sued and we say what have to say correctly on the record. The manager is here to ensure that our vision our mission that the five of us have decided is carried out together in that matter. Right now we don't have a unified mission. These individuals come to work every day to serve a sole purpose carry out our vision and our mission for the resident. It is for the people all the time whatever approach we take on this but we must all be unified. I want was best for the residents, I want a sense of community that is envied by the other municipalities. We are all over the place. You have to be present all the time be aware, and it is being involved in the community. I want us to work together and want to do what is right. I hope this is what the council wants. We got to get back to work. We need to stay connected to the people.

Gl. David Rosemond – state that there has been an effort on his part to get everyone involved that we shall be going in the same direction. Since that infamous email the people have been thrown off and there has been a lot of intrigue and one of the things have been talking that the test of professionalism is not the things we do well when times are good is the things we do well when times are bad. We were going to provide professionalism to the residents of El Portal in spite of what was going on. This has been super difficult time for him. He has officers coming in concerned how the future is going to be. As a CEO he has to be upfront with the employees but the commitment has continue and will continue to bring professionalism. This is not a marriage if I am not the right person as Councilperson Roman I am happy to be a transition figure for the next person especially in this important period such as budgeting. My work is my professional reputation makes me who I am, that I will protect that is why I am a little concerned that may have been affected. It is entirely up to you and I am prepare to move forward with whatever way the council decides.

Gm. Chair Mathis, Jr. as a chair this has been one of the toughest things I have ever had to do I am going to send to council that we seek a new manager.

Motion: A motion to send to full council to seek a new manager Action: Approved Moved by Councilperson Mathis, Jr., and Seconded by Councilperson Roman. The motion passed by voice vote.

Gm. Chair Mathis, Jr. thanked Village Manager for his service and understand his dedication to public service and wishes him well. Thanking him for being a part of El Portal.
Go. Village Manager David Rosemond states that he likes to work hard when things go bad and his emotions don't influence the quality of his work. He stated again he is here for a smooth transition.

Gp. Councilperson Roman said that she is aware that he came in a very difficult time and where he has brought the village to today.

Gq. Mayor Cubillos stated that would have wanted things to be different and an exit interview is necessarily.

Chairperson Mathis, Jr. stated it moves to full council.

H. **GOOD & WELFARE:** None noted.

I. **ADJOURNMENT:** Chair Mathis, Jr. called for a motion to adjourn the Special Administration & Finance committee meeting. Vice Chair Cubillos made a motion and Councilperson Roman seconded the motion. The motion carried unanimously. Meeting adjourned at 12:46 P.M.
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Village Manager Review Results

1. Individual Characteristics
2. Professional Skills & Status
3. Performance of Members of Governing Body
4. Policy Execution
5. Reporting
6. Citizen Relations
7. Stewardship
8. Supervision
9. Fiscal Management
10. Community

Question: #1
Village Attorney Performance Questionnaire

Village of El Portal

Evaluation period: [Initial date] to [5/8/2017]

VILLAGE MANAGER COPY

Each member of the governing body should complete this evaluation form, sign it in the space below, and return it to Administration & Finance Committee Chair by way of the Village Clerk. The deadline for submitting this performance evaluation is MAY 05, 2017. Evaluations will be summarized and included on the agenda for discussion at the work session on May 25, 2017.

Yenise Jacobi, Village Clerk

[Signature]

Governing Body Member’s Signature

[Signature]

Date Submitted
INSTRUCTIONS

This evaluation form contains ten categories of evaluation criteria. Each category contains a statement to describe a behavior standard in that category. For each statement, use the following scale to indicate your rating of the city manager's performance.

5 = Excellent (almost always exceeds the performance standard)
4 = Above average (generally exceeds the performance standard)
3 = Average (generally meets the performance standard)
2 = Below average (usually does not meet the performance standard)
1 = Poor (rarely meets the performance standard)

Any item left blank will be interpreted as a score of "3 = Average"

This evaluation form also contains a provision for entering narrative comments, including an opportunity to enter responses to specific questions and an opportunity to list any comments you believe appropriate and pertinent to the rating period. Please write legibly.

Leave all pages of this evaluation form attached. Initial each page. Sign and date the cover page. On the date space of the cover page, enter the date the evaluation form was submitted. All evaluations presented prior to the deadline identified on the cover page will be summarized into a performance evaluation to be presented by the governing body to the city manager as part of the agenda for the meeting indicated on the cover page.

PERFORMANCE CATEGORY SCORING

1. INDIVIDUAL CHARACTERISTICS
   - Diligent and thorough in the discharge of duties, "self-starter"
   - Exercises good judgment
   - Displays enthusiasm, cooperation, and will to adapt
   - Mental and physical stamina appropriate for the position
   - Exhibits composure, appearance and attitude appropriate for executive position

Add the values from above and enter the subtotal \( \frac{20}{5} + 5 = \frac{25}{5} \) score for this category

Page 2 of 7  Initials WEP
2. PROFESSIONAL SKILLS AND STATUS

- Maintains knowledge of current developments affecting the practice of local government management
- Demonstrates a capacity for innovation and creativity
- Anticipates and analyzes problems to develop effective approaches for solving them
- Willing to try new ideas proposed by governing body members and/or staff
- Sets a professional example by handling affairs of the public office in a fair and impartial manner

Add the values from above and enter the subtotal $20 + 5 = 4$ score for this category

3. RELATIONS WITH ELECTED MEMBERS OF THE GOVERNING BODY

- Carries out directives of the body as a whole as opposed to those of any one member or minority group
- Sets meeting agendas that reflect the guidance of the governing body and avoids unnecessary involvement in administrative actions
- Disseminates complete and accurate information equally to all members in a timely manner
- Assists by facilitating decision making without usurping authority
- Responds well to requests, advice, and constructive criticism

Add the values from above and enter the subtotal $20 + 5 = 4$ score for this category

4. POLICY EXECUTION

- Implements governing body actions in accordance with the intent of council
- Supports the actions of the governing body after a decision has been reached, both inside and outside the organization
- Understands, supports, and enforces local government's laws, policies, and ordinances
- Reviews ordinance and policy procedures periodically to suggest improvements to their effectiveness
- Offers workable alternatives to the governing body for changes in law or policy when an existing policy or ordinance is no longer practical

Add the values from above and enter the subtotal $20 + 5 = 4$ score for this category
5. **REPORTING**

- Provides regular information and reports to the governing body concerning matters of importance to the local government, using the city charter as guide
- Responds in a timely manner to requests from the governing body for special reports
- Takes the initiative to provide information, advice, and recommendations to the governing body on matters that are non-routine and not administrative in nature
- Reports produced by the manager are accurate, comprehensive, concise and written to their intended audience
- Produces and handles reports in a way to convey the message that affairs of the organization are open to public scrutiny

Add the values from above and enter the subtotal $26 + 5 = 31$ score for this category

6. **CITIZEN RELATIONS**

- Responsive to requests from citizens
- Demonstrates a dedication to service to the community and its citizens
- Maintains a nonpartisan approach in dealing with the news media
- Meets with and listens to members of the community to discuss their concerns and strives to understand their interests
- Gives an appropriate effort to maintain citizen satisfaction with city services

Add the values from above and enter the subtotal $19 + 5 = 24$ score for this category

7. **STAFFING**

- Recruits and retains competent personnel for staff positions
- Applies an appropriate level of supervision to improve any areas of substandard performance
- Stays accurately informed and appropriately concerned about employee relations
- Professionally manages the compensation and benefits plan
- Promotes training and development opportunities for employees at all levels of the organization

Add the values from above and enter the subtotal $18 + 5 = 23$ score for this category
8. **SUPERVISION**

Encourages heads of departments to make decisions within their jurisdictions with minimal city manager involvement, yet maintains general control of operations by providing the right amount of communication to the staff.

Instills confidence and promotes initiative in subordinates through supportive rather than restrictive controls for their programs while still monitoring operations at the department level.

Develops and maintains a friendly and informal relationship with the staff and work force in general, yet maintains the professional dignity of the city manager's office.

Sustains or improves staff performance by evaluating the performance of staff members at least annually, setting goals and objectives for them, periodically assessing their progress, and providing appropriate feedback.

Encourages teamwork, innovation, and effective problem-solving among the staff members.

Add the values from above and enter the subtotal $20 + 5 = 25$, score for this category

9. **FISCAL MANAGEMENT**

Prepares a balanced budget to provide services at a level directed by council.

Makes the best possible use of available funds, conscious of the need to operate the local government efficiently and effectively.

Prepares a budget and budgetary recommendations in an intelligent and accessible format.

Ensures actions and decisions reflect an appropriate level of responsibility for financial planning and accountability.

Appropriately monitors and manages fiscal activities of the organization.

Add the values from above and enter the subtotal $20 + 5 = 25$, score for this category
10. COMMUNITY

- Shares responsibility for addressing the difficult issues facing the city
- Avoids unnecessary controversy
- Cooperates with neighboring communities and the county
- Helps the council address future needs and develop adequate plans to address long-term trends
- Cooperates with other regional, state and federal government agencies

Add the values from above and enter the subtotal \( 20 + 5 = \) \( \frac{25}{4} \) score for this category

NARRATIVE EVALUATION

What would you identify as the manager's strength(s), expressed in terms of the principle results achieved during the rating period? ________________________________

______________________________

______________________________

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What performance area(s) would you identify as most critical for improvement? ________________________________

______________________________

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What constructive suggestions or assistance can you offer the manager to enhance performance?

________________________________________________________________________
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What other comments do you have for the manager; e.g., priorities, expectations, goals or objectives for the new rating period?

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Village Manager Performance Evaluation

Village of El Portal

Evaluation period: May 2016 to May 2017

COUNCILPERSON HAROLD E. MATHIS, JR.

Each member of the governing body should complete this evaluation form, sign it in the space below, and return it to Administration & Finance Committee Chair by way of the Village Clerk. The deadline for submitting this performance evaluation is MAY 05, 2017. Evaluations will be summarized and included on the agenda for discussion at the work session on May 25, 2017.

Yenise Jacobi, Village Clerk

[Signature]

Governor Body Member’s Signature: May 24, 2017

Date Submitted:
INSTRUCTIONS

This evaluation form contains ten categories of evaluation criteria. Each category contains a statement to describe a behavior standard in that category. For each statement, use the following scale to indicate your rating of the city manager's performance.

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PERFORMANCE CATEGORY SCORING

1. INDIVIDUAL CHARACTERISTICS
   
   __ __ Diligent and thorough in the discharge of duties, "self-starter"
   __ __ Exercises good judgment
   __ __ Displays enthusiasm, cooperation, and will to adapt
   __ __ Mental and physical stamina appropriate for the position
   __ __ Exhibits composure, appearance and attitude appropriate for executive position

Add the values from above and enter the subtotal __ __ + 5 = 2.8 score for this category

Page 2 of 7 Initials __ __
2. PROFESSIONAL SKILLS AND STATUS

3
Maintains knowledge of current developments affecting the practice of local government management

2
Demonstrates a capacity for innovation and creativity

2
Anticipates and analyzes problems to develop effective approaches for solving them

1
Willing to try new ideas proposed by governing body members and/or staff

1
Sets a professional example by handling affairs of the public office in a fair and impartial manner

Add the values from above and enter the subtotal 9 \( \div 5 = 1.8 \) score for this category

3. RELATIONS WITH ELECTED MEMBERS OF THE GOVERNING BODY

3
Carries out directives of the body as a whole as opposed to those of any one member or minority group

2
Sets meeting agendas that reflect the guidance of the governing body and avoids unnecessary involvement in administrative actions

2
Disseminates complete and accurate information equally to all members in a timely manner

2
Assists by facilitating decision making without usurping authority

2
Responds well to requests, advice, and constructive criticism

Add the values from above and enter the subtotal 12 \( \div 5 = 2.4 \) score for this category

4. POLICY EXECUTION

3
Implements governing body actions in accordance with the intent of council

4
Supports the actions of the governing body after a decision has been reached, both inside and outside the organization

1
Understands, supports, and enforces local government’s laws, policies, and ordinances

2
Reviews ordinance and policy procedures periodically to suggest improvements to their effectiveness

3
Offers workable alternatives to the governing body for changes in law or policy when an existing policy or ordinance is no longer practical

Add the values from above and enter the subtotal 18 \( \div 5 = 3.6 \) score for this category

Page 3 of 7 Initials _____
5. REPORTING

3. Provides regular information and reports to the governing body concerning matters of importance to the local government, using the city charter as guide

2. Responds in a timely manner to requests from the governing body for special reports

3. Takes the initiative to provide information, advice, and recommendations to the governing body on matters that are non-routine and not administrative in nature

4. Reports produced by the manager are accurate, comprehensive, concise and written to their intended audience

3. Produces and handles reports in a way to convey the message that affairs of the organization are open to public scrutiny

Add the values from above and enter the subtotal $\frac{15}{5} = 3$ score for this category

6. CITIZEN RELATIONS

3. Responsive to requests from citizens

3. Demonstrates a dedication to service to the community and its citizens

2. Maintains a nonpartisan approach in dealing with the news media

3. Meets with and listens to members of the community to discuss their concerns and strives to understand their interests

3. Gives an appropriate effort to maintain citizen satisfaction with city services

Add the values from above and enter the subtotal $\frac{16}{5} = 3.2$ score for this category

7. STAFFING

2. Recruits and retains competent personnel for staff positions

4. Applies an appropriate level of supervision to improve any areas of substandard performance

3. Stays accurately informed and appropriately concerned about employee relations

3. Professionally manages the compensation and benefits plan

3. Promotes training and development opportunities for employees at all levels of the organization

Add the values from above and enter the subtotal $\frac{14}{5} = 2.8$ score for this category
8. **SUPERVISION**

- Encourages heads of departments to make decisions within their jurisdictions with minimal city manager involvement, yet maintains general control of operations by providing the right amount of communication to the staff
- Instills confidence and promotes initiative in subordinates through supportive rather than restrictive controls for their programs while still monitoring operations at the department level
- Develops and maintains a friendly and informal relationship with the staff and work force in general, yet maintains the professional dignity of the city manager’s office
- Sustains or improves staff performance by evaluating the performance of staff members at least annually, setting goals and objectives for them, periodically assessing their progress, and providing appropriate feedback
- Encourages teamwork, innovation, and effective problem-solving among the staff members

Add the values from above and enter the subtotal \( \frac{13}{5} = 2.6 \) score for this category

9. **FISCAL MANAGEMENT**

- Prepares a balanced budget to provide services at a level directed by council
- Makes the best possible use of available funds, conscious of the need to operate the local government efficiently and effectively
- Prepares a budget and budgetary recommendations in an intelligent and accessible format
- Ensures actions and decisions reflect an appropriate level of responsibility for financial planning and accountability
- Appropriately monitors and manages fiscal activities of the organization

Add the values from above and enter the subtotal \( \frac{17}{5} = 3.4 \) score for this category

Page 5 of 7  **Initials**
10. COMMUNITY

- Shares responsibility for addressing the difficult issues facing the city
- Avoids unnecessary controversy
- Cooperates with neighboring communities and the county
- Helps the council address future needs and develop adequate plans to address long-term trends
- Cooperates with other regional, state and federal government agencies

Add the values from above and enter the subtotal \( 19 + 5 = 24 \) score for this category

NARRATIVE EVALUATION

What would you identify as the manager's strength(s), expressed in terms of the principle results achieved during the rating period? It is evident that the manager is a people person and she is great for the face of the village.

What performance area(s) would you identify as most critical for improvement? He needs to improve his time around and following up. He has to be repeated, advised, questioned to the status of certain matters.
What constructive suggestions or assistance can you offer the manager to enhance performance? I truly believe the production lines should be a transition to productivity.

What other comments do you have for the manager; e.g., priorities, expectations, goals or objectives for the new rating period?
Village Manager Performance Evaluation

Village of El Portal

Evaluation period: ________________ to ________________

VICE MAYOR OMARR C. NICKERSON

Each member of the governing body should complete this evaluation form, sign it in the space below, and return it to Administration & Finance Committee Chair by way of the Village Clerk. The deadline for submitting this performance evaluation is MAY 05, 2017. Evaluations will be summarized and included on the agenda for discussion at the work session on May 25, 2017.

Yenise Jacobi, Village Clerk

[Signature]

Governing Body Member's Signature

Date Submitted
INSTRUCTIONS

This evaluation form contains ten categories of evaluation criteria. Each category contains a statement to describe a behavior standard in that category. For each statement, use the following scale to indicate your rating of the city manager's performance.

5 = Excellent (almost always exceeds the performance standard)
4 = Above average (generally exceeds the performance standard)
3 = Average (generally meets the performance standard)
2 = Below average (usually does not meet the performance standard)
1 = Poor (rarely meets the performance standard)

Any item left blank will be interpreted as a score of "3 = Average"

This evaluation form also contains a provision for entering narrative comments, including an opportunity to enter responses to specific questions and an opportunity to list any comments you believe appropriate and pertinent to the rating period. Please write legibly.

Leave all pages of this evaluation form attached. Initial each page. Sign and date the cover page. On the date space of the cover page, enter the date the evaluation form was submitted. All evaluations presented prior to the deadline identified on the cover page will be summarized into a performance evaluation to be presented by the governing body to the city manager as part of the agenda for the meeting indicated on the cover page.

PERFORMANCE CATEGORY SCORING

1. INDIVIDUAL CHARACTERISTICS

Diligent and thorough in the discharge of duties, "self-starter"
Exercises good judgment
Displays enthusiasm, cooperation, and will to adapt
Mental and physical stamina appropriate for the position
Exhibits composure, appearance and attitude appropriate for executive position

Add the values from above and enter the subtotal \( \frac{25}{5} = 5 \) score for this category

Initials OKH
2. PROFESSIONAL SKILLS AND STATUS

Maintains knowledge of current developments affecting the practice of local government management
Demonstrates a capacity for innovation and creativity
Anticipates and analyzes problems to develop effective approaches for solving them
Willing to try new ideas proposed by governing body members and/or staff
Sets a professional example by handling affairs of the public office in a fair and impartial manner

Add the values from above and enter the subtotal $\frac{25}{5} = 5$ score for this category

3. RELATIONS WITH ELECTED MEMBERS OF THE GOVERNING BODY

Carries out directives of the body as a whole as opposed to those of any one member or minority group
Sets meeting agendas that reflect the guidance of the governing body and avoids unnecessary involvement in administrative actions
Disseminates complete and accurate information equally to all members in a timely manner
Assists by facilitating decision making without usurping authority
Responds well to requests, advice, and constructive criticism

Add the values from above and enter the subtotal $\frac{19}{5} = 3.8$ score for this category

4. POLICY EXECUTION

Implements governing body actions in accordance with the intent of council
Supports the actions of the governing body after a decision has been reached, both inside and outside the organization
Understands, supports, and enforces local government’s laws, policies, and ordinances
Reviews ordinance and policy procedures periodically to suggest improvements to their effectiveness
Offers workable alternatives to the governing body for changes in law or policy when an existing policy or ordinance is no longer practical

Add the values from above and enter the subtotal $\frac{22}{5} = 4.4$ score for this category

Page 3 of 7  Initials
5. **REPORTING**

- Provides regular information and reports to the governing body concerning matters of importance to the local government, using the city charter as guide
- Responds in a timely manner to requests from the governing body for special reports
- Takes the initiative to provide information, advice, and recommendations to the governing body on matters that are non-routine and not administrative in nature
- Reports produced by the manager are accurate, comprehensive, concise and written to their intended audience
- Produces and handles reports in a way to convey the message that affairs of the organization are open to public scrutiny

Add the values from above and enter the subtotal \( \frac{23}{5} = \frac{4}{5} \) score for this category

6. **CITIZEN RELATIONS**

- Responsive to requests from citizens
- Demonstrates a dedication to service to the community and its citizens
- Maintains a nonpartisan approach in dealing with the news media
- Meets with and listens to members of the community to discuss their concerns and strives to understand their interests
- Gives an appropriate effort to maintain citizen satisfaction with city services

Add the values from above and enter the subtotal \( \frac{25}{5} = 5 \) score for this category

7. **STAFFING**

- Recruits and retains competent personnel for staff positions
- Applies an appropriate level of supervision to improve any areas of substandard performance
- Stays accurately informed and appropriately concerned about employee relations
- Professionally manages the compensation and benefits plan
- Promotes training and development opportunities for employees at all levels of the organization

Add the values from above and enter the subtotal \( \frac{25}{5} = 5 \) score for this category

Page 4 of 7  Initials \( \underline{OX} \)
8. **SUPERVISION**

- Encourages heads of departments to make decisions within their jurisdictions with minimal city manager involvement, yet maintains general control of operations by providing the right amount of communication to the staff.
- Instills confidence and promotes initiative in subordinates through supportive rather than restrictive controls for their programs while still monitoring operations at the department level.
- Develops and maintains a friendly and informal relationship with the staff and work force in general, yet maintains the professional dignity of the city manager's office.
- Sustains or improves staff performance by evaluating the performance of staff members at least annually, setting goals and objectives for them, periodically assessing their progress, and providing appropriate feedback.
- Encourages teamwork, innovation, and effective problem-solving among the staff members.

Add the values from above and enter the subtotal: $23 + 5 = \frac{43}{6}$ score for this category.

9. **FISCAL MANAGEMENT**

- Prepares a balanced budget to provide services at a level directed by council.
- Makes the best possible use of available funds, conscious of the need to operate the local government efficiently and effectively.
- Prepares a budget and budgetary recommendations in an intelligent and accessible format.
- Ensures actions and decisions reflect an appropriate level of responsibility for financial planning and accountability.
- Appropriately monitors and manages fiscal activities of the organization.

Add the values from above and enter the subtotal: $25 + 5 = \frac{30}{5}$ score for this category.

Page 5 of 7  Initials: $\underline{\text{SC}}$
COMMUNITY

- Shares responsibility for addressing the difficult issues facing the city
- Avoids unnecessary controversy
- Cooperates with neighboring communities and the county
- Helps the council address future needs and develop adequate plans to address long-term trends
- Cooperates with other regional, state and federal government agencies

Add the values from above and enter the subtotal $25 + 5 = 5$ score for this category

NARRATIVE EVALUATION

What would you identify as the manager's strength(s), expressed in terms of the principle results achieved during the rating period? ________________________________

Open-Minded Respectful Humble Personality Polite Kind

What performance area(s) would you identify as most critical for improvement? ________________________________

Communication

Page 6 of 7  Initials A/A
What constructive suggestions or assistance can you offer the manager to enhance performance?

Communicate more often with updates to what was requested or what has changed administratively.

What other comments do you have for the manager; e.g., priorities, expectations, goals or objectives for the new rating period?

None
Village Manager Performance Evaluation
Village of El Portal

Evaluation period: ____________ to ____________

COUNCILPERSON VIMARI ROMAN

Each member of the governing body should complete this evaluation form, sign it in the space below, and return it to Administration & Finance Committee Chair by way of the Village Clerk. The deadline for submitting this performance evaluation is MAY 05, 2017. Evaluations will be summarized and included on the agenda for discussion at the work session on May 25, 2017.

Yenise Jacobi, Village Clerk

[Signature]

Governning Body Member’s Signature

[Signature]

Date Submitted
INSTRUCTIONS

This evaluation form contains ten categories of evaluation criteria. Each category contains a statement to describe a behavior standard in that category. For each statement, use the following scale to indicate your rating of the city manager’s performance.

5 = Excellent (almost always exceeds the performance standard)
4 = Above average (generally exceeds the performance standard)
3 = Average (generally meets the performance standard)
2 = Below average (usually does not meet the performance standard)
1 = Poor (rarely meets the performance standard)

Any item left blank will be interpreted as a score of “3 = Average”

This evaluation form also contains a provision for entering narrative comments, including an opportunity to enter responses to specific questions and an opportunity to list any comments you believe appropriate and pertinent to the rating period. Please write legibly.

Leave all pages of this evaluation form attached. Initial each page. Sign and date the cover page. On the date space of the cover page, enter the date the evaluation form was submitted. All evaluations presented prior to the deadline identified on the cover page will be summarized into a performance evaluation to be presented by the governing body to the city manager as part of the agenda for the meeting indicated on the cover page.

PERFORMANCE CATEGORY SCORING

1. INDIVIDUAL CHARACTERISTICS
   2. Diligent and thorough in the discharge of duties, “self-starter”
   3. Exercises good judgment
   3. Displays enthusiasm, cooperation, and will to adapt
   3. Mental and physical stamina appropriate for the position
   3. Exhibits composure, appearance and attitude appropriate for executive position

Add the values from above and enter the subtotal $\frac{11}{5} + 5 = $ score for this category

Page 2 of 7  Initials _-
2. PROFESSIONAL SKILLS AND STATUS

Maintains knowledge of current developments affecting the practice of local government management

Demonstrates a capacity for innovation and creativity

Anticipates and analyzes problems to develop effective approaches for solving them

Willing to try new ideas proposed by governing body members and/or staff

Sets a professional example by handling affairs of the public office in a fair and impartial manner

Add the values from above and enter the subtotal $\frac{\text{sum}}{5} = \text{score for this category}$

3. RELATIONS WITH ELECTED MEMBERS OF THE GOVERNING BODY

Carries out directives of the body as a whole as opposed to those of any one member or minority group

Sets meeting agendas that reflect the guidance of the governing body and avoids unnecessary involvement in administrative actions

Disseminates complete and accurate information equally to all members in a timely manner

Assists by facilitating decision making without usurping authority

Responds well to requests, advice, and constructive criticism

Add the values from above and enter the subtotal $\frac{\text{sum}}{5} = \text{score for this category}$

4. POLICY EXECUTION

Implements governing body actions in accordance with the intent of council

Supports the actions of the governing body after a decision has been reached, both inside and outside the organization

Understands, supports, and enforces local government's laws, policies, and ordinances

Reviews ordinance and policy procedures periodically to suggest improvements to their effectiveness

Offers workable alternatives to the governing body for changes in law or policy when an existing policy or ordinance is no longer practical

Add the values from above and enter the subtotal $\frac{\text{sum}}{5} = \text{score for this category}$
5. **REPORTING**

- Provides regular information and reports to the governing body concerning matters of importance to the local government, using the city charter as guide
- Responds in a timely manner to requests from the governing body for special reports
- Takes the initiative to provide information, advice, and recommendations to the governing body on matters that are non-routine and not administrative in nature
- Reports produced by the manager are accurate, comprehensive, concise and written to their intended audience
- Produces and handles reports in a way to convey the message that affairs of the organization are open to public scrutiny

Add the values from above and enter the subtotal $L_1 + 5 = $ _____ score for this category

6. **CITIZEN RELATIONS**

- Responsive to requests from citizens
- Demonstrates a dedication to service to the community and its citizens
- Maintains a nonpartisan approach in dealing with the news media
- Meets with and listens to members of the community to discuss their concerns and strives to understand their interests
- Gives an appropriate effort to maintain citizen satisfaction with city services

Add the values from above and enter the subtotal $L_2 + 5 = $ _____ score for this category

7. **STAFFING**

- Recruits and retains competent personnel for staff positions
- Applies an appropriate level of supervision to improve any areas of substandard performance
- Stays accurately informed and appropriately concerned about employee relations
- Professionally manages the compensation and benefits plan
- Promotes training and development opportunities for employees at all levels of the organization

Add the values from above and enter the subtotal $L_3 + 5 = $ _____ score for this category

Page 4 of 7  Initials _____
8. **SUPERVISION**

Encourages heads of departments to make decisions within their jurisdictions with minimal city manager involvement, yet maintains general control of operations by providing the right amount of communication to the staff.

Instills confidence and promotes initiative in subordinates through supportive rather than restrictive controls for their programs while still monitoring operations at the department level.

Develops and maintains a friendly and informal relationship with the staff and work force in general, yet maintains the professional dignity of the city manager's office.

Sustains or improves staff performance by evaluating the performance of staff members at least annually, setting goals and objectives for them, periodically assessing their progress, and providing appropriate feedback.

Encourages teamwork, innovation, and effective problem-solving among the staff members.

Add the values from above and enter the subtotal \( \frac{15}{5} = \) ______ score for this category.

9. **FISCAL MANAGEMENT**

Prepares a balanced budget to provide services at a level directed by council.

Makes the best possible use of available funds, conscious of the need to operate the local government efficiently and effectively.

Prepares a budget and budgetary recommendations in an intelligent and accessible format.

Ensures actions and decisions reflect an appropriate level of responsibility for financial planning and accountability.

 Appropriately monitors and manages fiscal activities of the organization.

Add the values from above and enter the subtotal \( \frac{14}{5} = \) ______ score for this category.
10. COMMUNITY

2. Shares responsibility for addressing the difficult issues facing the city
3. Avoids unnecessary controversy
4. Cooperates with neighboring communities and the county
5. Helps the council address future needs and develop adequate plans to address long term trends
6. Cooperates with other regional, state and federal government agencies

Add the values from above and enter the subtotal \( B + 5 \) = _____ score for this category

NARRATIVE EVALUATION

What would you identify as the manager's strength(s), expressed in terms of the principle results achieved during the rating period? Manager has worked fairly well with accountants and other staff to attend the granting the village of theirCrete with finances and admin. tasks. He has tried solutions and make decisions based on the effectiveness of those solutions.

What performance area(s) would you identify as most critical for improvement? Initiation to work on different areas of importance
Time management and communication openness to suggestions and keeping an open mind.

Page 6 of 7 Initials _____
What constructive suggestions or assistance can you offer the manager to enhance performance? 

- Work on better time management
- Schedule a time for follow-up and response
- Understanding the demands on the council and balancing

What other comments do you have for the manager; e.g., priorities, expectations, goals or objectives for the new rating period? 

- Set goals and objectives clearly for yourself and the team
- Provide feedback on goals and communication
Village Manager Performance Evaluation

Village of El Portal

Evaluation period: **May 2016** to **May 2017**

MAYOR CLAUDIA V. CUBILLOS

Each member of the governing body should complete this evaluation form, sign it in the space below, and return it to Administration & Finance Committee Chair by way of the Village Clerk. The deadline for submitting this performance evaluation is MAY 05, 2017. Evaluations will be summarized and included on the agenda for discussion at the work session on **May 25, 2017**.

Yenise Jacobi, Village Clerk

[Signature]

Governing Body Member's Signature

**6/2017**

Date Submitted
INSTRUCTIONS

This evaluation form contains ten categories of evaluation criteria. Each category contains a statement to describe a behavior standard in that category. For each statement, use the following scale to indicate your rating of the city manager’s performance.

5 = Excellent (almost always exceeds the performance standard)
4 = Above average (generally exceeds the performance standard)
3 = Average (generally meets the performance standard)
2 = Below average (usually does not meet the performance standard)
1 = Poor (rarely meets the performance standard)

Any item left blank will be interpreted as a score of “3 = Average”

This evaluation form also contains a provision for entering narrative comments, including an opportunity to enter responses to specific questions and an opportunity to list any comments you believe appropriate and pertinent to the rating period. Please write legibly.

Leave all pages of this evaluation form attached. Initial each page. Sign and date the cover page. On the date space of the cover page, enter the date the evaluation form was submitted. All evaluations presented prior to the deadline identified on the cover page will be summarized into a performance evaluation to be presented by the governing body to the city manager as part of the agenda for the meeting indicated on the cover page.

PERFORMANCE CATEGORY SCORING

1. INDIVIDUAL CHARACTERISTICS

3  Diligent and thorough in the discharge of duties, “self-starter”
3  Exercises good judgment
3  Displays enthusiasm, cooperation, and will to adapt
4  Mental and physical stamina appropriate for the position
2  Exhibits composure, appearance and attitude appropriate for executive position

Add the values from above and enter the subtotal 15 + 5 = 20 score for this category

Page 2 of 7  Initials C.C.
2. PROFESSIONAL SKILLS AND STATUS

3. Maintains knowledge of current developments affecting the practice of local government management

4. Demonstrates a capacity for innovation and creativity

3. Anticipates and analyzes problems to develop effective approaches for solving them

3. Willing to try new ideas proposed by governing body members and/or staff

3. Sets a professional example by handling affairs of the public office in a fair and impartial manner

Add the values from above and enter the subtotal \( \frac{16}{5} = 3.2 \) score for this category

3. RELATIONS WITH ELECTED MEMBERS OF THE GOVERNING BODY

3. Carries out directives of the body as a whole as opposed to those of any one member or minority group

3. Sets meeting agendas that reflect the guidance of the governing body and avoids unnecessary involvement in administrative actions

3. Disseminates complete and accurate information equally to all members in a timely manner

3. Assists by facilitating decision making without usurping authority

3. Responds well to requests, advice, and constructive criticism

Add the values from above and enter the subtotal \( \frac{15}{5} = 3 \) score for this category

4. POLICY EXECUTION

3. Implements governing body actions in accordance with the intent of council

3. Supports the actions of the governing body after a decision has been reached, both inside and outside the organization

3. Understands, supports, and enforces local government’s laws, policies, and ordinances

3. Reviews ordinance and policy procedures periodically to suggest improvements to their effectiveness

3. Offers workable alternatives to the governing body for changes in law or policy when an existing policy or ordinance is no longer practical

Add the values from above and enter the subtotal \( \frac{15}{5} = 3 \) score for this category
5. **REPORTING**

- Provides regular information and reports to the governing body concerning matters of importance to the local government, using the city charter as guide.
- Responds in a timely manner to requests from the governing body for special reports.
- Takes the initiative to provide information, advice, and recommendations to the governing body on matters that are non-routine and not administrative in nature.
- Reports produced by the manager are accurate, comprehensive, concise and written to their intended audience.
- Produces and handles reports in a way to convey the message that affairs of the organization are open to public scrutiny.

Add the values from above and enter the subtotal \( 13 + 5 = 18 \) score for this category.

6. **CITIZEN RELATIONS**

- Responsive to requests from citizens.
- Demonstrates a dedication to service to the community and its citizens.
- Maintains a nonpartisan approach in dealing with the news media.
- Meets with and listens to members of the community to discuss their concerns and strives to understand their interests.
- Gives an appropriate effort to maintain citizen satisfaction with city services.

Add the values from above and enter the subtotal \( 17 + 5 = 22 \) score for this category.

7. **STAFFING**

- Recruits and retains competent personnel for staff positions.
- Applies an appropriate level of supervision to improve any areas of substandard performance.
- Stays accurately informed and appropriately concerned about employee relations.
- Professionally manages the compensation and benefits plan.
- Promotes training and development opportunities for employees at all levels of the organization.

Add the values from above and enter the subtotal \( 16 + 5 = 21 \) score for this category.

Page 4 of 7   **Initials CMC**
8. **SUPERVISION**

2 Encourages heads of departments to make decisions within their jurisdictions with minimal city manager involvement, yet maintains general control of operations by providing the right amount of communication to the staff.

3 Instills confidence and promotes initiative in subordinates through supportive rather than restrictive controls for their programs while still monitoring operations at the department level.

3 Develops and maintains a friendly and informal relationship with the staff and work force in general, yet maintains the professional dignity of the city manager’s office.

1 Sustains or improves staff performance by evaluating the performance of staff members at least annually, setting goals and objectives for them, periodically assessing their progress, and providing appropriate feedback.

3 Encourages teamwork, innovation, and effective problem-solving among the staff members.

Add the values from above and enter the subtotal $\frac{12}{5} = 2.4$ score for this category.

9. **FISCAL MANAGEMENT**

3 Prepares a balanced budget to provide services at a level directed by council.

3 Makes the best possible use of available funds, conscious of the need to operate the local government efficiently and effectively.

3 Prepares a budget and budgetary recommendations in an intelligent and accessible format.

3 Ensures actions and decisions reflect an appropriate level of responsibility for financial planning and accountability.

4 Appropriately monitors and manages fiscal activities of the organization.

Add the values from above and enter the subtotal $\frac{16}{5} = 3.2$ score for this category.
10. COMMUNITY

- 3 Shares responsibility for addressing the difficult issues facing the city
- 3 Avoids unnecessary controversy
- 3 Cooperates with neighboring communities and the county
- 3 Helps the council address future needs and develop adequate plans to address long term trends
- 3 Cooperates with other regional, state and federal government agencies

Add the values from above and enter the subtotal $\frac{15}{5} = 3$ score for this category

NARRATIVE EVALUATION

What would you identify as the manager’s strength(s), expressed in terms of the principle results achieved during the rating period?

1) Ability to bring back to date areas of necessary post fiscal responsibility with little to no assistance from key predecessor. Irwin was key to assisting in this transition, so the manager bringing him back was a good necessary decision.
2) The manager’s enthusiasm and motivation with Public Works.

What performance area(s) would you identify as most critical for improvement?

1) Communication with residents, vendors and council
2) Supervision of each Department Heads
3) Reporting and updating to Council at Committee and Council meetings.

Page 6 of 7  Initials CRC
What constructive suggestions or assistance can you offer the manager to enhance performance?

1) Communication: calls and emails must be responded to either by manager or who he assigns/appoints or ask.
2) Supervision: Set Up meeting time (either monthly, weekly or quarterly - his decision) to discuss & set priorities/goals/achieve action plan that is measurable and accountable.
3) Reporting and updating: Council and Committee Chairs at the meeting: updates from those regularly scheduled dept heads meetings.

What other comments do you have for the manager; e.g., priorities, expectations, goals or objectives for the new rating period?

1) Priorities: Communication, Supervision & Department heads and reporting/updating Council at Council meetings with a report during managers report at every Commission meeting.

2) Expectations: Translate same energy, commitment and excitement about the Public Works department to all other department and their supervisors; so that project issues (big or small) (short term and long term) are addressed, followed through and measurable timeline.

3) Goals/objects: Communication, Reporting, Updating, Accountability from Department heads and a written report to Council at Managers Report Section.