



## City Clerk Evaluation

Please rate the City Clerk using the following scale:

5	Exceptional	Performance is consistently superior and significantly exceeds expectations.
4	Highly Effective	Performance frequently exceeds expectations.
3	Proficient	Performance consistently meets expectations.
2	Inconsistent	Performance meets some, but not all expectations.
1	Unsatisfactory	Performance consistently fails to meet minimum expectations; employee lacks skills required or fails to utilize necessary skills.
N/A	Not Applicable	Employee has not been in position long enough to have demonstrated the essential elements of the position and will be reviewed at a later agreed upon date.

<b>1. Administration and Organization Management</b>
<ul style="list-style-type: none"> <li>• The ability to structure the City Clerk's Office               <ul style="list-style-type: none"> <li>▪ Plans and organizes work in such a way as to effectively and efficiently meet the municipal service needs of City Commission, charter officers, department heads, employees, advisory board members and citizens</li> <li>▪ Carries out goals and policies adopted by the City Commission</li> </ul> </li> </ul>
<p>COMMENTS:</p> <p>North Port is seeing explosive growth that is being felt in every department and the City Clerk's Office is no exception. City Clerk has done a good job of assigning and tracking tasks assigned to her employees and ensuring that all tasks are performed in a timely basis. City Clerk's staff also created a public survey to solicit input from requestors regarding their experience. They received an average of 4.3/5.0, a very solid rating. During Hurricane Ian the department was able to provide both on-site and remote support to the EOC and the public. Staff is publishing advisory meeting notices well in advance of the city's 48-hour requirement. City Clerk has also done an excellent job documenting all appropriate policies and keeping them current with changing times.</p>

- 5-Exceptional  
  4-Highly Effective  
  3-Proficient  
  2-Inconsistent  
  1-Unsatisfactory  
 N/A-Not Applicable

<b>2. Budgeting and Financial Management</b>
<ul style="list-style-type: none"> <li>• The ability to develop and monitor budgets for:               <ul style="list-style-type: none"> <li>▪ City Commission</li> <li>▪ City Clerk's Office</li> </ul> </li> </ul>
<p>COMMENTS:</p>

City Clerk has done a very good job of managing both her departmental budget and the Commissioners' budgets. She has completed the retrieval and review of all off-site records for the Clerks department and has continued the records management project by providing departments with consolidated lists of their records stored off-site, assisting in the retrieval of boxes for review, possible processing into the City's records repository, Laserfiche, or destruction of records that have met retention. This project will continue to save City funds as it progresses.

- 5-Exceptional  
  4-Highly Effective  
  3-Proficient  
  2-Inconsistent  
  1-Unsatisfactory  
 N/A-Not Applicable

<b>3. Policy and Program Development</b>
<ul style="list-style-type: none"> <li>Demonstrates the ability to recommend policies related to City Clerk function to enhance the city's goals and objectives</li> </ul>
<p>COMMENTS:</p> <p>I was particularly concerned about our Advisory Boards not being as effective as they could be. City Clerk did a great job of updating the city's ordinance as it pertains to extending term limits, strengthening rules of decorum and implementing on-boarding processes and training for new board members and liaisons. City Clerk also presented the Commission with Policies related to the City's Historic Item Archive, Policy amendments related to Commission Minutes and Records, Commission Meeting Schedules, Notices, and Agendas.</p>

- 5-Exceptional  
  4-Highly Effective  
  3-Proficient  
  2-Inconsistent  
  1-Unsatisfactory  
 N/A-Not Applicable

<b>4. Ethics and Integrity</b>
<ul style="list-style-type: none"> <li>Conducts self in accordance with the ethical standards of the office of a Charter Officer</li> </ul>
<p>COMMENTS:</p> <p>City Clerk has conducted herself ethically and professionally and demands that her staff does also.</p>

- 5-Exceptional  
  4-Highly Effective  
  3-Proficient  
  2-Inconsistent  
  1-Unsatisfactory  
 N/A-Not Applicable

<b>5. Communication Skills</b>
<ul style="list-style-type: none"> <li>Demonstrates effective oral and written communication skills</li> </ul>
<p>COMMENTS:</p> <p>City Clerk has really focused on her communication skills and I have seen an improvement in her ability to present and respond to questions regarding her agenda items. Over the past year, I have had some calendar issues some the result of technical issues on my part; others due to incomplete and/or erroneous information on the calendar notice. All seem to be resolved at this point. I am not a "rules and regulations" maven and appreciate the City</p>

Clerk's advice when properly handling the more uncommon occurrences on the dais. And I love those "tidbits."

- 5-Exceptional  4-Highly Effective  3-Proficient  2-Inconsistent  1-Unsatisfactory  
 N/A-Not Applicable

#### 6. Interaction With The Public

- Maintains a positive relationship with the public
- Timely response to public records requests
- Represents the City in a professional, articulate manner when attending/presenting at community events, neighborhood meetings or social gatherings

#### COMMENTS:

I do not often have the opportunity to observe the City Clerk's interactions with the public, so do appreciate her initiative in conducting a "customer satisfaction" survey (see above). I do see the number and intensity of our public records requests and have great admiration for staff's ability to effectively and respond to that demand in a timely way.

- 5-Exceptional  4-Highly Effective  3-Proficient  2-Inconsistent  1-Unsatisfactory  
 N/A-Not Applicable

#### 7. Interaction With Commission

- Maintains an open and trusting relationship with the City Commission, both collectively and individually
  - Responds to their concerns in an effective and timely manner
  - Plays a supportive role to the Commission in their responsibilities as elected officials, without getting involved in partisan politics

#### COMMENTS:

City Clerk and her staff respond to questions, suggestions, etc., in a timely and professional manner. I am particularly pleased with City Clerk's help with parliamentary procedure, particularly this year, as I am mayor. The book she secured for me on that topic was excellent and much more helpful than the book I purchased for myself. Heather seems to be much more comfortable in her role and I very much appreciate her support.

- 5-Exceptional  4-Highly Effective  3-Proficient  2-Inconsistent  1-Unsatisfactory  
 N/A-Not Applicable

#### 8. Interaction With Intergovernmental And Professional Agencies

- Maintains a positive relationship with other governmental agencies
- Fosters a high level of respect for the City of North Port
- Effectively serves as the Election Official for the City of North Port

#### COMMENTS:

City Clerk interacts with many outside agencies, including the Supervisor of Elections, Division of Elections, neighboring municipalities regarding elections and scheduling/coordination of meetings. Her working relationships appear to be effective.

- 5-Exceptional    4-Highly Effective    3-Proficient    2-Inconsistent    1-Unsatisfactory  
 N/A-Not Applicable

#### 9. Interaction With Charter Officers And Department Directors

- Establishes and maintains a positive working relationship with Charter Officers and Department Directors displaying support and concern for their role in City Government

COMMENTS:

We all have areas of performance that are more in line with our natural working style and other areas that just do not come “naturally.” I applaud City Clerk for not only willingly participating in a DiSC assessment, but also using that information to focus on areas for improvement. I also share City Clerk’s preference for digging in and getting things done, but I am delighted that she has recognized the importance of communications and building strong relationships.

- 5-Exceptional    4-Highly Effective    3-Proficient    2-Inconsistent    1-Unsatisfactory  
 N/A-Not Applicable

#### 10. Leadership/Supervision

- Portray a healthy tolerance for the uncertainties which are inherent in municipal management
- Demonstrate a friendly and supportive attitude toward City Clerk staff, encouraging them to seek guidance in resolving problems related to the city organization
- Challenge City Clerk staff to perform at their highest level
- Exhibit effectiveness at leading, directing and developing City Clerk staff
- Demonstrates the ability to set a high standard of performance for City Clerk’s office
- Fosters a sense of commitment to provide a high level of public service to the citizens
- Maintains a positive and fair work environment that supports City Clerk employees to ensure their professional success
- Encourages staff development

COMMENTS:

City Clerk leads by example and supports the development and career progression of her team members. She budgets for education reimbursement, online webinars, and training for records management, Parliamentarian, and Florida Association of City Clerks. This year one staff member completed Parliamentarian training, and another obtained their Certified Municipal Clerk designation. Staff members have taken advantage of online training webinars.

- 5-Exceptional    4-Highly Effective    3-Proficient    2-Inconsistent    1-Unsatisfactory  
 N/A-Not Applicable

**OVERALL RATING**

Score

- 5-Exceptional    4-Highly Effective    3-Proficient    2-Inconsistent    1-Unsatisfactory  
 N/A-Not Applicable

**(CITY COMMISSIONERS COMMENT)**

Heather has come a long way in the 2 + years I have known her. I rely on her expertise and guidance in my role as mayor this year and appreciate all the help she has given me. She is a strong leader and tackles issues in her department with insight and courage, resulting in positive outcomes. I really enjoy working with her. One of my managers told me early in my career that long after coworkers forgot what I accomplished, they will remember how working with me made them feel. Heather has clearly realized this for herself and focuses on important areas, like communications and building relationships, to achieve positivity in all her relationships.

**(EMPLOYEES COMMENT)**

**CITY CLERK SIGNATURE / DATE:**

(INSERT SIGNATURE)	(INSERT DATE)
--------------------	---------------

**CITY COMMISSIONER SIGNATURE / DATE:**

(INSERT SIGNATURE) <i>Barbara Langdon</i>	(INSERT DATE) <i>3/6/2023</i>
--	----------------------------------