



## 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>The rapid growth of the city has impacted every department in the city, including the Clerk’s Office. Heather and her team have:</p> <ul style="list-style-type: none"> <li>• Completed the review of over 2,100 agreement/contracts, 1,700 Resolutions, 10,000 Minutes, 240 Easements, and 400 Deeds within Laserfiche</li> </ul> <p>In addition, the following projects have been completed:</p> <ul style="list-style-type: none"> <li>• Reorganized the Archive Room to ensure proper placement and tracking of records, placing all permanent records in archive folders and boxes to ensure records are preserved per state archive guidelines.</li> <li>• Drafted and reviewed agendas and meeting minutes for approximately 200 Commission &amp; Advisory Board Meetings, ensuring posting of agendas in advance of the 48-hour requirement (typically 5-7 days in advance of meetings), accuracy and timely completion of all advisory board and Commission meeting minutes, posting of required legal advertisements and business impact estimates.</li> </ul> <p>In addition, Heather has done an excellent job recognizing and rewarding deserving members of her organization, and recently promoted internally for the Recording Secretary II position and the Assistant City Clerk position.</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>
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.</p>

- 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>
COMMENTS:
<p>Heather continues to do an excellent job developing and monitoring the Commission and Clerk's Office budgets. She has continued to maintain a high service level while remaining staffed at 8 FT positions. She and her staff have continued to implement records management, ensuring proper disposition of records that have met retention; training other departments in the proper procedure for the disposition of records.</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>
COMMENTS:
<p>City Clerk has conducted herself ethically and professionally and demands that her staff does as well.</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>

**COMMENTS:**

The City Clerk’s office has continued to communicate with Advisory Board members and staff liaisons providing training, an updated Advisory Board Handbook, responding to a variety of questions along the way, and providing directors and staff with meeting minute notes (motions) following all Commission meetings to assist in preparation for directors' meetings. Given that I am running for re-election this year, I specifically appreciate her knowledge of campaign conduct and reporting requirements and her support when I have questions.

- 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:**

Heather continues to work on her communication skills and has increased her visibility to the general public. Specifically, she has:

- Served on the Florida Association of City Clerk Scholarship Committee for a second year
- Participated as a Big Sister with the Big Brother/Big Sister Beyond School Walls Program for the third year
- Was accepted to the North Port Leadership 2024 Class
- And was accepted to the Florida Certified Professional Clerk Program.

Public records requests continue to come into the city at an exceptionally high rate, particularly as our city grows. They are filled in a timely manner. She has also implemented changes to better enhance the customers experience such as the titling of attachments, public record archiving, and legal holds for retention purposes.

- 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:

Heather always answers my questions quickly.  
 Agendas always seem to be available well in advance of our meetings, although I do appreciate that late submissions can slow her down...but are not her fault!  
 Although the last year was not an election year, this year is!! The current Election Candidate Handbooks have been updated, election packets created, and training on the new Form 6 requirements made available to all 4 current candidates for city commission.

- 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. From what I can see, her working relationships appear to be effective.  
 I appreciate that she has started posting Advisory Board vacancies in the newspaper.

- 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:

Heather reviews all job descriptions and job competencies and presents recommended changes to Human Resources. One of her staff members filled in for a Human Resources employee that was out of the office for an extended period of time.  
 She maintains positive working relationships with both the City Attorney and City Manager with emphasis on agenda preparation, policies, and Legal Ad templates she is currently creating for the Planning and Zoning Division.

- 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:

She continues to focus on helping her team improve their professional skills. This year one staff member completed Parliamentary training, and another is working towards their Certified Municipal Clerk designation.

I already mentioned the 2 promotions of staff in her team, and both are performing at a high level during our commission meetings.

I applaud her continued use of DISC to improve working relationships within her department - All staff within the department have completed DISC assessments. She also conducts teambuilding events and holds regular staff meetings.

Their Holiday Card Lane creation was unique and had to have been fun to create. Well done, team!

**XX 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 successfully managed the loss of employees in two critical positions – Assistant City Clerk and Recording Secretary. She promoted from within and both promotions were well deserved and do a great job at our commission meetings.

She is always positive and upbeat even on those days when nothing seems to go as planned. She is a pleasure to work with.

**(EMPLOYEES COMMENT)**

**CITY CLERK SIGNATURE / DATE:**

(INSERT SIGNATURE)	(INSERT DATE)
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**CITY COMMISSIONER SIGNATURE / DATE:**

(INSERT SIGNATURE) <i>Barbara Langdon</i>	(INSERT DATE) 4/3/2024
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