



## 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.

1. Administration and Organization Management
<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> <ul style="list-style-type: none"> <li>• As the City grows and changes, so do the tasks within the department. Working with staff in the department, we tracked current tasks of each staff member to include both tasks listed on each job description and tasks performed. In doing so we were able to evaluate and adjust job descriptions to accurately reflect job tasks. This also assisted in determining and assigning a primary and backup for all functions within the department to ensure there is coverage for all tasks when needed. This assisted in the continued training of staff and efficiency in meeting the needs of all and provides more opportunity for remote/flex work to support staff work/life balance.</li> <li>• Public Records staff created a public survey sent to all requestors regarding their request experience and currently has a rating of 4.33 out of 5 stars which speaks highly to having the right staff in the right position!</li> <li>• Staff and I have continued to utilize downtime to work on projects such as organizing permanent records (Ordinance, Resolution, and Minutes) into archive folders and boxes to ensure proper preservation of these records and to provide easier accessibility to records within the City's Records Archive. We have organized and logged items within the City's Historic Item Archive room.</li> <li>• During Hurricane Ian, myself and staff members were able to provide both on-site and remote assistance to the EOC, and the public, where applicable. Staff members worked together to</li> </ul>

ensure all business within the department was still accomplished while allowing for personal time of each to handle recovery matters following the hurricane.

- The department continues to draft and publish Commission and Advisory Board agendas well in advance of the City's 48-hour requirement. We are typically posting 5-7 days prior to meetings. This allows for extended review of agenda items for all board members as well as citizens who are interested.
- The Commission has approved a number of policies within the last couple of years. The Clerk's department continues to monitor these policies to ensure they are providing the most effective processes, we follow all established policy, and provide support in amending policy upon Commission direction.

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

## 2. Budgeting and Financial Management

- The ability to develop and monitor budgets for:
  - City Commission
  - City Clerk's Office

### COMMENTS:

- Along with staff, developed and monitored budget for both Commission and the Clerk's office. Our department FY22 budget was \$824,920 with a 4.4% increase in operational budget and overall budget increase of 5.8%.
- Continues to track Commission budget spending based on individual line items and overall budget balance to ensure each Commissioner has the most up-to-date information throughout the year.
- Has completed retrieval and review of all off-site records for the Clerks department. 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 we progress.

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

## 3. Policy and Program Development

- Demonstrates the ability to recommend policies related to City Clerk function to enhance the city's goals and objectives

### COMMENTS:

- Upon review of current code, advisory board meetings, and Commission response to my presentation, I drafted an Ordinance amending advisory boards general code to provide consistency amongst boards, enforcement of decorum, and to promote interest on serving on City advisory boards.
- During this evaluation period we have 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.

- The Clerk’s department has created training for advisory board members and for chair/vice chair to be provided at the time of appointment and annually to all board members. Chair/vice chair training will be conducted prior to the annual election of each.

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> <ul style="list-style-type: none"> <li>• I have continued to conduct myself in accordance with the ethical standards of a Charter Officer and have carried myself in a professional manner.</li> </ul>

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> <ul style="list-style-type: none"> <li>• I demonstrate effective oral and written communication skills with staff, Charter Officers, and Commission. I keep all informed of information in a timely and professional manner. We have worked towards centralizing Commission calendars to avoid calendar conflicts, missed updates to event, and/or missed opportunities to attend events.</li> <li>• I have continued to focus on my communication style and those of others to ensure I am accommodating their style while still getting my point across. We are currently working towards all staff within the department taking a DiSC assessment so that we are better able to team build and define areas that might need additional focus.</li> <li>• In last years evaluation, I had mentioned that I would like to focus on communication skills and confidence in presenting items during Commission meetings. I have taken more time in the preparation of my agenda items so that when presenting I have been able to confidently respond to questions received from the Commission.</li> <li>• I have been able to provide Commission with responses and recommendations regarding Parliamentary Procedures during meetings. Previously, I did not feel comfortable interrupting. I have learned and practiced this past year, to determine when it makes sense to communicate my suggestion during the meeting or to follow up and provide a “tidbit” in an email after the meeting.</li> </ul>

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

<b>6. Interaction With The Public</b>
<ul style="list-style-type: none"> <li>• Maintains a positive relationship with the public</li> <li>• Timely response to public records requests</li> <li>• Represents the City in a professional, articulate manner when attending/presenting at community events, neighborhood meetings or social gatherings</li> </ul>
<p>COMMENTS:</p>

- This is my second year as part of the Beyond School Walls program in the City and as a member on the Florida Association of City Clerk’s Sponsorship Board. I have represented the City in a professional manner while attending these events, meetings and other City/out of City events.
- I have continued success with my positive relationships with the public. Where others have found situations difficult, I have been able to build a rapport with individuals that have helped in resolution of concerns or at the least diffused situations.
- I have developed great working relationships with advisory board members that has led to ease of board meeting process and procedure in many instances.
- The City has processed approximately 2,900 public records requests during this evaluation period. Requests continue to be filled in a timely manner and requests are monitored to ensure departments are filling their activities timely and follow up as need.

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

<b>7. Interaction With Commission</b>
<ul style="list-style-type: none"> <li>• Maintains an open and trusting relationship with the City Commission, both collectively and individually               <ul style="list-style-type: none"> <li>▪ Responds to their concerns in an effective and timely manner</li> <li>▪ Plays a supportive role to the Commission in their responsibilities as elected officials, without getting involved in partisan politics</li> </ul> </li> </ul>
<p>COMMENTS:</p> <ul style="list-style-type: none"> <li>• I am responsive to all commission concerns, questions, and/or suggestions. Taking all Commissioners into consideration while ensuring I can accommodate each “style” individually and provide compromise when needed.</li> <li>• I value my working relationship with each Commissioner and take pride in ensuring I have provided the best input as possible, occasionally providing a different view that I hope provides some ease and more understanding for all.</li> <li>• Each year I become more comfortable in my communication skills with Commissioners. I enjoy seeing the benefits of the communication whether it is how a policy starts and comes to fruition or a process ends up running smoother. Through my communication with each, I am able to learn and understand their needs that much better.</li> </ul>

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

<b>8. Interaction With Intergovernmental And Professional Agencies</b>
<ul style="list-style-type: none"> <li>• Maintains a positive relationship with other governmental agencies</li> <li>• Fosters a high level of respect for the City of North Port</li> <li>• Effectively serves as the Election Official for the City of North Port</li> </ul>
<p>COMMENTS:</p> <ul style="list-style-type: none"> <li>• My relationships with other governmental agencies to include, but not limited to, the Supervisor of Elections, Division of Elections, neighboring municipalities regarding elections and scheduling/coordination of meetings has been very positive. I continue to gain working relationships that have allowed me the ability to seek information and assistance to help my success in this position.</li> </ul>

- During the past year, I have effectively served as the Election Official for the Primary (which we did not have) and the General Election. I ensured all documents and information were available to all candidates, responded to numerous questions to assist in their campaigns, and ensured a smooth election for all. I continuously update the Candidate Handbook that I created so ensure the most up-to-date information is available.

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:

- I continue to have positive working relationships with Charter Officers and Department Directors. I recently participated in the City Managers retreat for Directors and it was confirmed that my DiSC style is the reason I have trouble in this area. I continue to have a desire for more one-on-one interaction, but my style is more focused on accomplishing tasks than having meetings. BUT, I will continue to keep trying to grow in this area!
- I appreciate and respect the role of each Director within the City and am always willing to assist where I can. As a department, we continue to assist with, but not limited to, processing of records requests, board agendas, Commission agenda items and documents, and Commission calendars.

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:

- I strongly support staff development and career progression. Currently, we budget 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.

- I have taken the approach this evaluation period of not providing the answers but providing the tools to find the answers for staff. Critical thinking skills and problem solving are important for staff development and in empowering staff. This has also shown increase in confidence and initiative of some staff.
- I provide the means and the support for all staff within my department to excel in their tasks while demonstrating the ability to set a high standard of performance. I expect of myself, and my staff, that the work leaving our department is of great quality. We represent ourselves, the department, and the City. Some staff within the department, along with myself, have taken attention to detail training to help zone in on those errors that we may otherwise overlook.
- Ensuring we have a cohesive team is a primary focus for me. We have revamped our office setup to allow for team collaboration and a more relaxed atmosphere when needed. We continue to hold regular staff meetings and team building activities.

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)

--

(EMPLOYEES COMMENT)

I truly enjoy my job and responsibility of this position, the Team I have, and working with the Commission and City Staff to enhance this great City!
---

**CITY CLERK SIGNATURE / DATE:**

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

**CITY COMMISSIONER SIGNATURE / DATE:**

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