



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"> • The ability to structure the City Clerk’s Office <ul style="list-style-type: none"> ▪ 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 ▪ Carries out goals and policies adopted by the City Commission
<p>COMMENTS:</p> <ul style="list-style-type: none"> • I have been very impressed with Heather’s more recent hires and promotions. Deputy City Clerk and the new Board Specialist have assumed their new responsibilities with apparent ease. Both were great hires and are doing a great job. • Heather did a very good job better integrating the efforts of our advisory boards by including their minutes and memos into the commission agendas. This approach has made it much easier for commissioners to stay abreast of advisory board priorities and have timely conversations on the dais regarding their recommendations.

5-Exceptional
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 N/A-Not Applicable

2. Budgeting and Financial Management
<ul style="list-style-type: none"> • The ability to develop and monitor budgets for: <ul style="list-style-type: none"> ▪ City Commission ▪ City Clerk’s Office
<p>COMMENTS:</p> <ul style="list-style-type: none"> • I am impressed with how cost effectively Heather manages her department. The team in the Clerk’s office produces a lot of work while keeping costs in check

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3. Policy and Program Development
<ul style="list-style-type: none"> • Demonstrates the ability to recommend policies related to City Clerk function to enhance the city's goals and objectives
<p>COMMENTS:</p> <ul style="list-style-type: none"> • Heather is currently working on a new policy regarding the storage of records off-site. Looking forward to her recommendations • We have discussed in the past ways of making our Advisory Boards more effective. One of the suggestions was improved on-boarding of new members. I would be interested in hearing more about what steps we have taken to make our boards more effective and the results of those efforts. • We also discussed documenting the process for commissioners and the community members to introduce/add agenda topics. Looking forward to a future discussion on that topic.

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4. Ethics and Integrity
<ul style="list-style-type: none"> • Conducts self in accordance with the ethical standards of the office of a Charter Officer
<p>COMMENTS:</p> <ul style="list-style-type: none"> • Heather conducts herself and holds her team members to the highest ethical standards

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5. Communication Skills
<ul style="list-style-type: none"> • Demonstrates effective oral and written communication skills
<p>COMMENTS:</p> <ul style="list-style-type: none"> • Heather consistently makes herself available to assist in any way she can, and I always feel comfortable "barging" into her office with a question or concern • As a candidate running for re-election, I appreciate Heather's reminders when reports are due to her office. • I have taken as an action item for myself to schedule regular quarterly meetings, or more frequent if warranted, with Heather to stay abreast of the progress and challenges of her department.

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6. Interaction With The Public

<ul style="list-style-type: none"> • 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
<p>COMMENTS:</p> <ul style="list-style-type: none"> • Heather’s team has a tough job interacting with the public, particularly around the volume of public records requests. She has had challenges this year from some community members and I am impressed with her ability to maintain her composure and professionalism dealing with those issues.

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<p>7. Interaction With Commission</p> <ul style="list-style-type: none"> • Maintains an open and trusting relationship with the City Commission, both collectively and individually <ul style="list-style-type: none"> ▪ 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
<p>COMMENTS:</p> <ul style="list-style-type: none"> • I made some comments earlier in this review that I appreciate her “open door” policy. • She demonstrates the ability to “stay above the fray” when dealing with interpersonal issues on the board and she has never uttered a political opinion in my presence, though I suspect it is sometimes tempting to do so.

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<p>8. Interaction With Intergovernmental And Professional Agencies</p> <ul style="list-style-type: none"> • 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
<p>COMMENTS:</p> <ul style="list-style-type: none"> • Heather takes advantage of opportunities to improve her skills as City Clerk. She recently graduated from the North Port Area Chamber of Commerce Leadership Class of 2024, improving her knowledge of the city and its residents and businesses throughout the County • She successfully completed the primary election in August which included the qualification of 7 candidates most of whom had little or no previous knowledge of how the “system” works • I can honestly say I have only heard positive things from the other candidates about the quality of her support and professionalism

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<p>9. Interaction With Charter Officers And Department Directors</p>

<ul style="list-style-type: none"> Establishes and maintains a positive working relationship with Charter Officers and Department Directors displaying support and concern for their role in City Government
<p>COMMENTS:</p> <ul style="list-style-type: none"> From what I can see, Heather maintains a positive working relationships with all staff within the City, including City Manager and (acting) City Attorney She has created an internal process (Smartsheet) to assist department directors and Charter Officers in tracking official documents and for a centralized location for retrieval of fully executed documents.

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<p>10. Leadership/Supervision</p> <ul style="list-style-type: none"> 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
<p>COMMENTS:</p> <ul style="list-style-type: none"> Heather sets a high bar for herself and her team. She takes advantage of professional growth opportunities for herself and encourages her staff to do the same As stated earlier, Heather has made some excellent hires and has done a very good job developing her team and promoting from within Administrative support has been occasionally spotty. Sometimes calendar items are not added/updated in a timely way and some requests for assistance need follow-up before they are completed.

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OVERALL RATING

Score

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(CITY COMMISSIONERS COMMENT)

Heather does a very good job managing her team and structuring the work for maximum efficiency. She has made some great hires, and I sense that she has built strong team spirit in her department. This year has been challenging, with the city being called out for “lack of transparency” around records requests. Heather maintained her composure throughout, responded fairly to the requester, ensured the requester obtained whatever records were available, and kept the commission abreast of how she handled the situation and outcomes. I also appreciate her ability to handle an ever increasing workload while maintaining headcount.

(EMPLOYEES COMMENT)

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CITY CLERK SIGNATURE / DATE:

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

(INSERT SIGNATURE)	(INSERT DATE)
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