

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.

## **Administration and Organization Management**

- The ability to structure the City Clerk's Office
  - 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

## **COMMENTS:**

Created method for tracking Commission attendance at board/committee meetings; Modified tracking method based on pros and cons of Fiscal Year (FY) 25 to ensure more efficient process for FY 26; Reviewed department Standard Operating Procedures (SOP) for updates and completeness; Drafted and finalized 8 SOP's for Administrative Service Specialist position; Provided annual review and updates to staff job descriptions to ensure accuracy;

Records Management: Completed the processing of approximately 800 signed documents including resolutions, ordinances, minutes, agreements, contracts, etc.

Commission & Advisory Board Meetings: Drafted and reviewed agendas and meeting minutes for approximately 300 meetings ensuring posting of agendas one week in advance of the meetings.

⊠5-Exceptiona	al □4-Highly Effective	$\square$ 3-Proficient	$\square$ 2-Inconsistent	$\Box$ 1-Unsatisfactory
□ N/A-Not Applicable				
2. Budgeting and Financial Management				
•	The ability to develop	and monitor bud	gets for:	

- - **City Commission**
  - City Clerk's Office

COMMENTS:  Monitored and tracked Commission and City Clerk FY 25 spending ensuring expenditures stayed within the approved budget with the Commission and the Clerk's budget both coming in well under budget for the year; Completed FY 26 Commission and City Clerk budgets more than two weeks ahead of schedule with proposed areas for cuts; Continued to provide high level of service with no requested increase in personnel; Continued records management project ensuring proper disposition of records that have met retention with staff coordinating the retrieval of boxes from off-site location for purposes of digitalizing records reducing the cost of off-site storage leaving only 1200 boxes currently off-site.				
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:  Recommended changes to advisory board criteria regarding dual office holding to increase board memberships; Created and managed Commission attendance tracking for appointed boards/committees; Reviewed and recommended changes for the streamlining of document recording for resolutions throughout city departments.				
$\Box$ 5-Exceptional $\boxtimes$ 4-Highly Effective $\Box$ 3-Proficient $\Box$ 2-Inconsistent $\Box$ 1-Unsatisfactory $\Box$ N/A-Not Applicable				
4. Ethics and Integrity				
Conducts self in accordance with the ethical standards of the office of a Charter Officer				
COMMENTS: Continued to conduct myself with the ethical standards of the city and of the office of a Charter Officer.				
$\boxtimes$ 5-Exceptional $\square$ 4-Highly Effective $\square$ 3-Proficient $\square$ 2-Inconsistent $\square$ 1-Unsatisfactory $\square$ N/A-Not Applicable				
5. Communication Skills				
Demonstrates effective oral and written communication skills				
COMMENTS:				
Consistently demonstrates exceptional communication skills; Articulates ideas clearly and confidently in both verbal and written formats; Actively listens to others and adapts to the communication style to suit individual preferences; Continues to improve in being more receptive of ideas that differ.				
$\Box$ 5-Exceptional $\boxtimes$ 4-Highly Effective $\Box$ 3-Proficient $\Box$ 2-Inconsistent $\Box$ 1-Unsatisfactory $\Box$ 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:**

Maintains a positive professional relationship with the public that allows for open communication and receipt of recommendations for improvement in processes related to the Clerk's Department, Advisory Boards, and Public Records Request; Staff receives both verbal and written accolades from the public; Completed the Florida Certified Professional Clerk Program with expected graduation on October 7, 2025; Currently serving as fourth year as a Big Sister with the Big Brother/Big Sister Beyond School Walls Program; Staff processed approximately over 2,600 public record requests in a timely manner with accolades received from outside attorney as well as the public regarding the timeliness of responses.

October 7, 2025; Currently serving as fourth year as a Big Sister with the Big Brother/Big Sister Beyond			
School Walls Program; Staff processed approximately over 2,600 public record requests in a timely			
manner with accolades received from outside attorney as well as the public regarding the timeliness			
of responses.			
$\Box$ 5-Exceptional $oxtimes$ 4-Highly Effective $oxtimes$ 3-Proficient $oxtimes$ 2-Inconsistent $oxtimes$ 1-Unsatisfactory			
□ N/A-Not Applicable			
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7. Interaction With Commission			
Maintains an open and trusting relationship with the City Commission, both			
collectively and individually			
<ul> <li>Responds to their concerns in an effective and timely manner</li> </ul>			
<ul> <li>Plays a supportive role to the Commission in their responsibilities as elected</li> </ul>			
officials, without getting involved in partisan politics			
COMMENTS:			
Provides a line of open communication with all Commissioners understanding their individual			
leadership styles and needs; Continues to respond to all questions and concerns expeditiously to			
ensure information is provided accurately and in a timely manner; Creates all Commission agenda			
item requests ensuring proper processing and assistance in placement on an upcoming agenda;			
Continues to support Commissioners individually and collectively with consistency across all			
interactions and without involvement in partisan politics.			
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$\Box$ 5-Exceptional $oxtimes$ 4-Highly Effective $oxtimes$ 3-Proficient $oxtimes$ 2-Inconsistent $oxtimes$ 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:			
Coordinated with the Sarasota County Supervisor of Election (SOE) Office for the 2024 General			
Election and the 2025 Special Election; Attended the IIMC Region III Conference and IIMC Annual			
Conference with City Clerks from local, national, and international municipalities.			

☐5-Exceptional	⊠4-Highly Effective	☐3-Proficient	☐2-Inconsistent	$\Box$ 1-Unsatisfactory
☐ N/A-Not Appli	cable			

## 9. Interaction With Charter Officers And Department Directors

	Establishes and maintai Department Directors d Government	•	•	with Charter Officers and their role in City
COMMENTS				
Continued the Attorney and C the Police Publ	maintenance of posit City Manager with em	phasis on agen draft 8 potent	nda preparation ar tial job descriptior	nd policies; Worked with ns for staff; Staff works
□5-Exceptional □ N/A-Not Appli	⊠4-Highly Effective cable	☐3-Proficient	☐2-Inconsistent	☐1-Unsatisfactory
10. Leaders	hip/Supervision			
	Portray a healthy tolera	nce for the unce	ertainties which are	e inherent in municipal
	management			
	•	• • •		ty Clerk staff, encouraging
	them to seek guidance			e city organization
	Challenge City Clerk sta	•	-	ov. ol 1
	Exhibit effectiveness at	-		•
			•	nance for City Clerk's office
		•	•	oublic service to the citizens
	•		onment that suppo	orts City Clerk employees to
	ensure their profession			
COMMENTS	Encourages staff develo	pment		
Created Board S conjunction wi department lea	Specialist training sched th Human Resources	conducted cor two positions a	mpensation studie	and new staff members; In es of positions within the ation of the Staff Assistant II
☐5-Exceptional ☐ N/A-Not Appli	⊠4-Highly Effective cable	☐3-Proficient	☐2-Inconsistent	☐1-Unsatisfactory
OVERALL RATING	<u> </u>			
Score	ı			
Score				
☐5-Exceptional	⊠4-Highly Effective	□3-Proficient	□2-Inconsistent	☐1-Unsatisfactory
☐ N/A-Not Appli	• ,			
□ N/A NOCAPPII	Cabic			
(CITY COMMISSIC	ONERS COMMENT)			
		<u> </u>		

(EMPLOYEES COMMENT)				
CITY CLERK SIGNATURE / DATE:				
(INSERT SIGNATURE)	(INSERT DATE)			
CITY COMMISSIONER SIGNATURE / DATE:				
(INSERT SIGNATURE)	(INSERT DATE)			