



## 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

- 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:

- Records Management - Completed the review of over 2,100 agreement/contracts, 1,700 Resolutions, 10,000 Minutes, 240 Easements, and 400 Deeds within Laserfiche to ensure proper metadata and titling of all documents. 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.
- Commission & Advisory Board Meetings – Drafted and reviewed agendas and meeting minutes for approximately 200 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.
- Promoted internally for the Recording Secretary II position and the Assistant City Clerk position.

☒ 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

<p>▪ City Clerk's Office</p>
<p>COMMENTS:</p> <ul style="list-style-type: none"> <li>• Developed and monitored budget for both Commission and the Clerk's office.</li> <li>• Maintained the same level, if not higher, of service while remaining staffed with 8 full time positions.</li> <li>• FY 23 budget was \$958,520 with a 27% increase in operational budget which included codification of the Unified Land Development Code re-write and overall budget increase of 15%.</li> <li>• Continued 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.</li> <li>• Continued records management project by ensuring proper disposition of records that have met retention; staff providing one-on-one meetings with departments to review processes and procedure for the disposition of records; continued support by the majority of City departments in retrieving their off-site records for review, possible processing into the City's records repository or destruction of records that have met retention which will continue to save City funds as the project progresses.</li> </ul>

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<p><b>3. Policy and Program Development</b></p>
<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> <ul style="list-style-type: none"> <li>• Completed amended policies for Commission Meetings and Agendas and Commission Minutes and Records</li> <li>• Recommended and completed Ordinance amending requirements for the Citizen Tax Oversight Committee</li> <li>• Drafted and completed Historic and Cultural Advisory Board Suspension resolution and Planning and Zoning Advisory Board Attendance ordinance.</li> </ul>

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<p><b>4. Ethics and Integrity</b></p>
<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>• Continued to conduct myself in accordance with the ethical standards of a Charter Officer and carried myself in a professional manner.</li> </ul>

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<p><b>5. Communication Skills</b></p>
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<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>• Continued to communicate with Advisory Board members and staff liaisons providing training, an updated Advisory Board Handbook, and responding to a variety of questions along the way.</li> <li>• Provide directors and staff with meeting minute notes (motions) following all Commission meetings to assist in preparation for directors' meetings.</li> </ul>

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<p><b>6. Interaction With The Public</b></p>
<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> <ul style="list-style-type: none"> <li>• Served on the Florida Association of City Clerk Scholarship Committee for a second year; as a Big Sister with the Big Brother/Big Sister Beyond School Walls Program for the third year; accepted to the North Port Leadership 2024 Class; and accepted to the Florida Certified Professional Clerk Program.</li> <li>• Public records requests continue to be filled in a timely manner. Recent changes have been made to better enhance the customers experience such as titling of attachments, public record archiving, and legal holds for retention purposes.</li> </ul>

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<p><b>7. Interaction With Commission</b></p>
<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>• Answers all Commission questions and concerns expeditiously to ensure they have the information they need as quickly as possible.</li> <li>• Creates all Commission agenda item requests, ensuring proper processing and assistance in placement on an upcoming agenda.</li> <li>• Takes pride in the fact that politics have no place in my interaction with each Commissioner and I can support them collectively and individually while ensuring I am consistent in my interactions with each.</li> </ul>

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<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>• This year was not an election year, however current Election Candidate Handbooks were updated, election packets created, and training on the new Form 6 requirements were completed.</li> <li>• Processed candidate packets and campaign reporting forms for four current candidates.</li> <li>• Continued to work with the Supervisor of Elections Office, the Division of Elections, and surrounding municipalities maintaining a positive and purposeful relationship.</li> <li>• Started posting Advisory Board vacancies in the newspaper.</li> </ul>

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<b>9. Interaction With Charter Officers And Department Directors</b>
<ul style="list-style-type: none"> <li>• Establishes and maintains a positive working relationship with Charter Officers and Department Directors displaying support and concern for their role in City Government</li> </ul>
<p>COMMENTS:</p> <ul style="list-style-type: none"> <li>• Reviewed all job descriptions and job competencies and presented recommended changes to Human Resources.</li> <li>• One staff member provided administrative support to Human Resources to help cover for an employee that was out of the office for an extended period of time.</li> <li>• Continued the maintenance of positive working relationships with both the City Attorney and City Manager with emphasis on agenda preparation, policies, and Legal Ad templates that I am currently creating for the Planning and Zoning Division.</li> <li>• 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 colanders.</li> </ul>

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<b>10. Leadership/Supervision</b>
<ul style="list-style-type: none"> <li>• Portray a healthy tolerance for the uncertainties which are inherent in municipal management</li> <li>• Demonstrate a friendly and supportive attitude toward City Clerk staff, encouraging them to seek guidance in resolving problems related to the city organization</li> <li>• Challenge City Clerk staff to perform at their highest level</li> <li>• Exhibit effectiveness at leading, directing and developing City Clerk staff</li> <li>• Demonstrates the ability to set a high standard of performance for City Clerk's office</li> <li>• Fosters a sense of commitment to provide a high level of public service to the citizens</li> <li>• Maintains a positive and fair work environment that supports City Clerk employees to ensure their professional success</li> </ul>

<ul style="list-style-type: none"><li>• Encourages staff development</li></ul>
<p>COMMENTS:</p> <ul style="list-style-type: none"><li>• Continue to 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 is working towards their Certified Municipal Clerk designation.</li><li>• Continues to encourage staff to work towards advancements in their positions or other positions that will not only provide for career growth but will provide additional services to our community.</li><li>• Teambuilding continues to be a primary focus in the department. We have continued with regular staff meetings and teambuilding activities. We participated in the Holiday Card Lane creating a GREAT card for the department.</li><li>• All staff within the department completed DISC assessments.</li></ul>

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**OVERALL RATING**

Score

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

(CITY COMMISSIONERS COMMENT)

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(EMPLOYEES COMMENT)

I continued to learn every single day I am in this position and truly enjoy it. I have the most amazing staff in my department that continue to push me, and I would not be successful without all the hard work they put into the department/City. I would also not be successful without the support of this Commission. Thank you all.
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**CITY CLERK SIGNATURE / DATE:**

(INSERT SIGNATURE) <b>Heather Faust</b> <small>Digitally signed by Heather Faust Date: 2024.03.13 13:00:04 -04'00'</small>	(INSERT DATE)
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**CITY COMMISSIONER SIGNATURE / DATE:**

(INSERT SIGNATURE)	(INSERT DATE)
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