
City of Belle Isle

City Manager Performance Evaluation

Evaluation period: January-December 2024

James "Jim" Patten

Governing Body Member's Name

Each governing body member should complete this evaluation form, sign it in the space below, and return it to the City of Belle Isle City Clerk. The deadline for submitting this performance evaluation is March 4, 2025.

Evaluations will be summarized for the Mayor and included on the agenda for discussion at the City Council meeting on March 18, 2025.



Governing Body Member's Signature

3-4-2025

Date Submitted

Mayor's Signature

Date Reviewed

Yvonne Owen rec'd 3/5/2025



INSTRUCTIONS

This evaluation form contains eight evaluation criteria. Each category contains a statement to describe a behavior standard in that category. For each statement, use the following scale to indicate your rating of the city manager's performance.

- 5 = Excellent** (almost always exceeds the performance standard)
- 4 = Above average** (generally exceeds the performance standard)
- 3 = Average** (generally meets the performance standard)
- 2 = Below average** (usually does not meet the performance standard)
- 1 = Poor** (rarely meets the performance standard)

Any item left blank will be interpreted as a score of "3 = Average"

This evaluation form also contains a provision for entering narrative comments, including an opportunity to enter responses to specific questions and an opportunity to list any comments you believe are appropriate and pertinent to the rating period. Please write legibly.

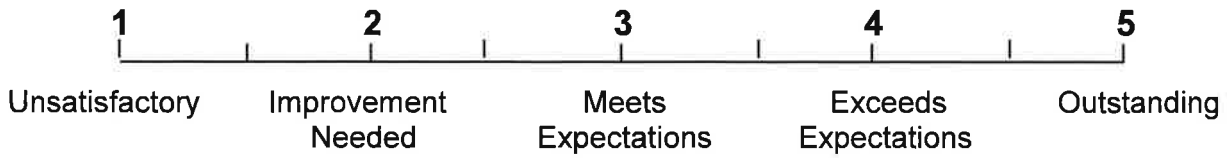
Leave all pages of this evaluation form attached. Initial each page. Sign and date the cover page. On the cover page date, enter the date the evaluation form was submitted. All evaluations presented before the deadline identified on the cover page will be summarized into a performance evaluation to be presented by the governing body to the city manager as part of the agenda for the meeting indicated on the cover page.

Process

1. The City Clerk will provide Evaluation forms to the Mayor and all Council Members
2. Each Council Member completes the forms, signs them, and returns one copy to the Mayor and City Clerk.
3. The Clerk tabulates the results of the Evaluation forms.
4. The City Manager may prepare a memorandum to the Council, including self-evaluation, using the Self-Evaluation Form.
5. A composite of the Council evaluation forms and the City Manager's self-evaluation are distributed to the Council, Mayor, and City Manager prior to the evaluation meeting.
6. The Council meets with the City Manager in a scheduled meeting to jointly review the evaluation.
7. The Mayor will establish the operating ground rules for the session, including, but not limited to, such considerations as location, time, or time considerations for any particular subject matter.
8. The evaluation process shall occur annually, as close to the anniversary of the hiring date of the City Manager, except that the Council may request an evaluation at any time.



CITY OF BELLE ISLE EVALUATION OF CITY MANAGER



Rate the following categories using the chart above.

1. Relating with Governing Body - Providing Information

- | | | |
|--|--|------------|
| a. | Keep the City Commission informed in an appropriate and timely manner about matters critical to the Commission’s policymaking role and relevant legislation and developments in the area of public policy affecting the City | 3
_____ |
| b. | Anticipate and follow up promptly on Commission requests for information or action without having to be reminded. | 3
_____ |
| c. | Carries our directives of the body as a whole as opposed to those of any one member or minority group. | 2
_____ |
| d. | Consider all available alternatives before making recommendations to the Commission. And plans in anticipation of future needs and concerns | 2
_____ |
| e. | Sets meeting agendas that reflect the guidance of the governing body and Avoids unnecessary involvement in administrative actions. | 2
_____ |
| f. | Responds well to requests, advice, and constructive criticism | 3
_____ |
| Add the values from above and enter the subtotal <u>115</u> + 6 = <u>211</u> score for this category | | |

Comments on Relating to the Governing Body

Rick often forwards updates or information from the state/county. Other than that there is no additional critical information provided other than through council meetings/reading packets/discuss new matters. The communication received from Rick is a text on Tuesday morning of council meetings asking if we accept. Rick has brought matters to the council that he himself could have handled. Reduction of a voting location was brought to us and all alternatives were not considered before making recommendations to council. Rick was unaware early voting

2. Organizational Relations: Fiscal Management

- a. Develop and administer a process of budget preparation and review which meets the requirements of the City Charter, and expectations of the Council in its decision-making role. 4
- b. Control operational and capital costs through adequate budgetary controls, cost-saving measures, opportunities for budget reductions, and the judicious/economical utilization of manpower, material, and equipment. 3
- c. Provide the Commission with timely and sufficient reports on the financial status of the City government in accordance with the Charter and requirements of the Commission. 3

Add the values from above and enter the subtotal 10 + 3 = 13 score for this category

Comments on Fiscal Management

I want to see Rick and his staff stay within the budget and budget lines. I heard the statement in a council meeting that if we go over on a line we can take from another line and just amend the budget. Sometimes this might be necessary but a budget is to be adhered to not adjusted to suit the whims of a department.

3. Personnel Management

- a. Effectuate sound personnel selection and placement policies. 3
- b. Motivate all levels of personnel through leadership and training so that they are increasingly effective in the performance of their duties, in achieving common goals and objectives and in nurturing an attitude of courtesy, helpfulness, and sensitivity to the public. 3
- c. Promotes and supports the "public service role" for City employees and emphasizes exemplary performance. 4

Add the values from above and enter the subtotal 10 + 3 = 13 score for this category

Comments on Personnel Management



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Add the values from above and enter the subtotal 110 + 3 = 113 score for this category

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Comments on Personnel Management

4. Managing the Organization

- a. Execute/Implement the policies adopted by the Commission in a timely and appropriate fashion. 2
- b. Supports the actions of the governing body after a decision has been Reached, both inside and outside the organization 4
- c. Understands, supports, and enforces local government laws, policies, and ordinances. 4
- d. Review ordinance and policy procedures periodically to suggest improvements to their effectiveness 3
- e. Offers workable alternatives to the governing body for changes in law or policy when an existing policy or ordinance is no longer practical. 3

Add the values from above and enter the subtotal 16 + 5 = 21 score for this category

Comments on Managing the Organization

I would like to see Rick conduct more review of policies and ordinances and find where we need to make improvements.

5. Relations with the Public

- a. Responsive to requests, disputes, or complaints involving citizens in an effective, equitable, and timely manner. 4
- b. Meets with and listens to members of the community to discuss their concerns and strives to understand their interests 4
- c. Gives an appropriate effort to maintain residents' satisfaction with City services. 4

Add the values from above and enter the subtotal 12 + 3 = 15 score for this category

Comments on Relations with the Public

In my experiences with Rick and residents in my district where he has helped with issues or matters that have come up he has gone out of his way to meet with folks understand and provides a high level of customer service. Thinking of the dock issue in the neighbor dispute.

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6. Relations with Other Governments

- a. Deal effectively with other governmental agencies in representing the City of Belle Isle. 3

- b. Develop and administer an effective program of grantsmanship. 2

Add the values from above and enter the subtotal 5 + 2 = 7 score for this category

Comments on Relations with Other Governments

need to build relationships within areas of Orange County, district 3 commissioner? has there been presence at nav board meetings? school board meetings? No work has been done that I am aware on developing or administering an effective program on grantsmanship.

List any goals, achievements, and objectives.

Reach out to the county and build relationships, fire, district 3 comm, etc.

Reach out to other local CM's and build relationships.

These relationships could open doors or provide opportunity for the city.

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List any goals, achievements, and objectives.

Reach out to the county and build relationships, fire, district 3 comm, etc.
Reach out to other local CMOs and build relationships.
These relationships could open doors or provide opportunity for the city.

Commission Member Observations – Narrative Evaluation

- A.** Two things that the manager does now that this Commission member would most like him/her to continue, discontinue, or modify.

The time in which to complete tasks takes far too long. The landscape around city hall was removed in June/July 2024 and nothing was planted until 12/2024 the day before light the way. The task of painting PD and CH have been on the to-do list for nearly one year. The inside is still not painted in CH. Continuing to work on updating the Purchasing Policy for a year. The study on Conway and Judge has been on the list for one year as well as other to-do's. Sense of urgency.

- B.** What would you identify as the manager's strength(s), expressed in terms of the principles results achieved during the rating period?

Rick shows a high level of customer service and works to understand the residents and help to resolve the matters that come before him in an equitable manner. He lets the staff do their jobs and trusts them to do their jobs with little involvement or oversight.

- C.** What are your priorities, expectations, and objectives for the new rating period that you expect the City Manager to initiate or accomplish?

Complete tasks in a timely fashion, set a date in mind to complete tasks quicker.
Sense of urgency, defy normal government and get things done go the extra mile.
Make decisions with confidence and own them.
Have team meetings again regularly for your staff. Be it bi-weekly, monthly, weekly?
Pursue annexation opportunities please.

Rick depends on his staff too much rather than digging in and knowing more himself, he often has to seek answers in meetings from his clerk that he should know after a year.
Example: Caught off guard by the arrangement for voting and not having an understanding what the clerk put in place. who's idea was this and where did it come from?

- D.** What constructive suggestions or assistance can you offer the City Manager to enhance performance?

Ricks work ethic is strong; he is honest, and trustworthy, sometimes too agreeable, and appears unwilling to push back when needed. Rick is a super nice guy and prefers not to "hurt" feelings and steers away from conflict.

Commission Member Observations – Narrative Evaluation

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Rick shows a high level of customer service and works to understand the residents and help to resolve the matters that come before him in an equitable manner. He lets the staff do their jobs and trusts them to do their jobs with initiative and oversight.

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7. Managerial and Administrative Performance

1	2	3	4	5	
			X		Accessible and maintains good rapport with elected officials, staff, and the public.
		X			Demonstrates a capacity for innovation and creativity
		X			Anticipates and analyzes problems to develop practical approaches for solving them
			X		Willing to try new ideas proposed by the governing body and/or staff
				X	Sets a professional example by handling affairs of the public office in a fair and impartial manner

Add the values from above and enter the subtotal 19 + 5 = 24 score for this category.

Comments on Managerial and Administrative Performance

Staff appreciate that Rick allows them to do their jobs; however they would like to have more involvement from Rick and desire regular all hands on deck meetings. Rick is willing to try new ideas and accommodates the council ideas. If Rick has brought innovation & creativity to the job I am unaware.

8. Personal Qualities

1	2	3	4	5	
	X				Diligent and thorough in the discharge of duties, "self-starter."
				X	Exercises good judgment
		X			Open/forthright and make tough decisions.
		X			Displays enthusiasm and cooperation and will adapt.
			X		Exhibits composure, appearance, and attitude appropriate for an executive position

Add the values from above and enter the subtotal 17 + 5 = 22 score for this category.

Comments on Personal Qualities

discharge of duties - slow to complete to do's
 apprehensive to make tough decisions
 appearance; I do not know if there is a grooming policy; hair can at times be too long and

Overall Rating
(Consider all items above)



Additional Comments

When concerns arise with staff and CM, there needs to be protocol in our employee manual to provide a place for the staff to go to; such as a lawyer working for the city, a neutral party, the Mayor or Vice Mayor?

Lower amount of \$ CM has permission to approve w/ no council input during emergency powers.

Perhaps the charter should be changed back to allow the Mayor to communicate with council and have no vote or perhaps have a vote.

Consider whether the CM has a conflict of interest because they have a monopoly on the system and there is no check and balance. Makes all decisions.

Consider whether council and Mayor should have access to staff, or be able to request staff assistance. Not necessarily direct the staff, but someone to help council and Mayor when needed.

Evaluation Completed by: James Jimé Partin

Date: 3-4-2025



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Evaluation Completed by: James "Jim" Partin

Date: 3-4-2025

City of Belle Isle

City Manager Performance Evaluation

Evaluation period: January -December 2024

Salary Adjustment

James "Jim" Partin
Governing Body Member's Name

Based on your appraisal of the City Manager's performance over the previous twelve (12) months, do you recommend a salary increase? _____yes X_____no

If yes, what information would you like to have to determine the appropriate increase?

If no, please comment,

Based on this previous year I have not reached the point where I believe an increase is warranted. Rick assumed the job and has quietly done the job, I believe there are areas for improvement for Rick this coming year.

- Knowledge of local governmental operations.
- Ability to establish and maintain effective working relationships with, government officials. Outside COBI
- Ability to make effective decisions.
- Directs and supervises the administration of all departments, offices, and agencies of the City.
- Keeps the Council fully advised as to the financial condition and future needs of the City and make recommendations to Council concerning the affairs of the City. (I should know more sooner, not discover in a meeting)

I would like to have a better understanding of what Rick does from day to day and week to week, what is he bringing to the table himself, I look forward to reviewing and gaining this insight from his self evaluation.

City of Belle Isle

City Manager Performance Evaluation

Evaluation period: January -December 2024

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[Empty box for response]

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-Keeps the Council fully advised as to the financial condition and future needs of the City and

[Signature] Comm/Mayor initials

City of Belle Isle City Manager Position Description

General Description: The City Manager serves as the chief administrative officer of the City and is responsible for the day-to-day operations of the City and is appointed by and serves under the City Council. The City Manager is responsible for the supervision and direction of all departments, agencies, or offices of the City.

Essential Job Functions:

- Appoints and when necessary for the good of the City, suspends or removes all City employees and appointive administrative officers provided for, by or under the City Charter, except as otherwise provided by law, the charter or personnel rules adopted pursuant to the charter.
- Authorizes any administrative officer subject to the manager's direction and supervision to exercise these powers with respect to subordinates in that officer's department or agency.
- Directs and supervises the administration of all departments, offices, and agencies of the City, except as otherwise provided by the charter or laws.
- Attends all City Council meetings and has the right to take part in discussion but does not vote.
- Assures that all laws, provisions of the charter and acts of the Council, subject to enforcement by the City Manager or by officers subject to the manager's direction and supervision, are faithfully executed.
- Prepares and submits the annual budget and capital program to the City Council.
- Submits to the Council and makes available to the public a complete report on the finances and administrative activities of the City at the end of each fiscal year.
- Makes other reports as the Council may require concerning the operations of the City departments, offices, and agencies that are subject to the City Manager's direction and supervision.
- Keeps the Council fully advised as to the financial condition and future needs of the City and make recommendations to Council concerning the affairs of the City.
- Signs contracts on behalf of the City pursuant to the provisions of appropriate ordinances.
- Provides staff support for the mayor and commissioners.
- Establishes personnel policies governing appointment, retention, and promotion of City employees, which policies shall include a grievance procedure.
- Serves as the purchasing agent for the City as established by the charter.
- Performs other job related functions as needed or directed by City Council.

(These essential job functions are not to be construed as a complete statement of all duties performed. Employees will be required to perform other job related duties as required. listed herein are intended to be consistent with the Charter and Ordinances of the City of Belle Isle and the laws of the State of Florida, and this document may not be construed to supersede, overrule, or convey any authority that is inconsistent with such Charter provisions, ordinances, or laws)

Minimum Requirements:

- Bachelor's Degree or higher from an accredited College/University with a major in Business or Public Administration or related field, plus five years' experience in progressively responsible management position in local government or an equivalent combination of education and experience.
- ICMA-Credentialed Manager (current/active).
- Must obtain a valid Florida Driver's License within 90 days of employment.
- Knowledge, Abilities, and Skills:
- Thorough knowledge of the principles and practices of governmental administration, governmental budgeting and governmental regulations.
- Knowledge of local governmental operations.
- Knowledge of research techniques and source availability of required or requested information.
- Ability to communicate effectively both orally and in writing.



-
- Ability to establish and maintain effective working relationships with , government officials, private organizations, and the general public, and effectively utilize resources.
 - Ability to make effective decisions.
 - Ability to maintain records, files, and reports in accordance with established methods and procedures.
 - Ability to read, interpret, and analyze instructions and/or data effectively.
 - Ability to work independently with minimal supervision.
 - Ability to formulate, submit and administer budgets.
 - Ability to function in a sophisticated computer environment.

Environmental Conditions:

Works in an office environment

City of Belle Isle

City Manager Performance Evaluation

Evaluation period: January -December 2024

City Manager Self-Evaluation

Directions: Your responses to these questions must be completed and attached to your performance and development self-evaluation. Additional pages may be added as necessary.

1. How have you accomplished your goals and/or work assignments in your first year of employment?

2. What other job-related accomplishments have you had that were not part of the goals set during your first year?

3. What obstacles or setbacks did you encounter during the year?

4. What do you see as your major goal(s) for this next evaluation period?
What can the City Council do to help you accomplish these goals?



5. What suggestions do you have for improving the effectiveness between you, the Council, and Mayor?

6. Do you have specific training needs that the Council can facilitate, and how will those needs help you meet your goals?

7. Are there any other issues or comments you wish to share?

