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## Town Manager Performance Evaluation

**Town Manager's Name:** Sean O'Keefe  
**Council Member Name:** Martha MacFarlane  
**Evaluation Period:** October 1, 2022 to September 30, 2023  
**Evaluation Date:** September 21, 2023

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### Evaluation Instructions:

This form shall be completed by each member of the Council to evaluate the Town Manager's performance in each of the areas noted below. Each member of the Board shall sign the end of the form and forward it to the Town Attorney. Performance levels can be based on the following scale:

- 5 – EXCELLENT:** The incumbent consistently demonstrates performance at a very high standard that significantly surpasses reasonable expectations.
- 4 – SUPERIOR:** The incumbent consistently demonstrates performance that generally exceeds reasonable expectations. The individual demonstrates no appreciable performance deficiencies.
- 3 – SATISFACTORY:** The incumbent consistently meets reasonable performance expectations. The individual demonstrates an acceptable degree of competence and performance.
- 2 – FAIR:** The incumbent achieves the minimum of performance expectations. The individual requires development in specific areas in order to meet reasonable expectations of performance.
- 1 – UNSATISFACTORY:** The incumbent frequently fails to meet minimum performance expectations.

**Timeline:** October 1, 2022 through September 30, 2023

## Town Manager Performance Evaluation

### Performance Dimensions:

<b>1. Professional Skills and Expertise</b>		<b>Rating:</b>
a. Is knowledgeable of current developments affecting the management field and affecting local governments.		3
b. Regularly provides accurate, comprehensive reports concerning matters of importance to the organization.		2
c. Anticipates problems and develops effective approaches for solving them.		3
d. Offers workable alternatives when changes in the law render the administration of an ordinance or policy impractical.		3
e. Sets a professional example by handling the affairs of the organization in a fair and impartial manner.		2
<b>Total Rating for this Performance Dimension:</b>		<b>13</b>
<b>Comment:</b>	<p>This is Mr. O’Keefe’s first year as a Town Manager and he demonstrates a freshman level of skill and expertise in his role.</p> <p>Reports on active projects are sporadic and Council frequently has to prompt for status/updates. For example, the purchase of the land for the new wells and water plant was delayed because the owner offered additional land, but O’Keefe was not proactive in managing legal review and execution of the sale. When asked his response was that he was waiting for legal or had to make a call to get the status.</p> <p>Additionally, when asked if the FGUA/Woodard &amp; Curran agreement included a hydraulic study the initial response was “yes” but the hydraulic study was not within the scope of deliverables.</p> <p>Mr. O’Keefe has shown that he does not support nor understands the importance of the Police Department to the residents of the Town. Several residents have expressed the sentiment that he does not value the contributions of and requirement for the safety the presence of the PD provides; the role it plays in supporting property values and keeping Howey, “Howey”.</p>	

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## Town Manager Performance Evaluation

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<b>2. Council/Commission Relations</b>		<b>Rating:</b>
a. Carries out directives of the Board as a whole rather than those of any one Boardmember.		3
b. In responding the requests for information, provides complete, accurate, and timely information equally to all Board members.		3
c. Assists the Board by resolving problems at the administrative level to avoid unnecessary Board action.		3
d. Assists the Board in establishing policy while acknowledging the ultimate authority of the Board.		4
e. Is willing to try new ideas proposed by Board members.		3
<b>Total Rating for this Performance Dimension:</b>		<b>16</b>
<b>Comment:</b>	<p>Mr. O’Keefe provides an opportunity for an agenda briefing to each Councilor and includes all Councilors in communications/responses. He often states that he is managed by all five Councilors and that his function is to fulfill the will of the Council.</p> <p>Additional verification by the full Council would assist in eliminating staff concerns/confusion and work done to satisfy any one Councilor.</p>	

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## Town Manager Performance Evaluation

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<b>3. Citizen and Public Relations</b>		<b>Rating:</b>
a. Effectively conveys to the public that the organization delivers services in a cost-effective manner without sacrificing quality and customer focus.		3
b. Is willing to meet with members of the community and is responsive to their concerns.		4
c. Demonstrates a dedication to service to the community and its citizens.		3
d. Expresses information orally in a clear and concise manner when making public presentations.		2
e. Is skillful with the news media, proactively providing information that is important to the public.		3
<b>Total Rating for this Performance Dimension:</b>		15
Comment:	<p>Mr. O'Keefe has an open-door policy to staff and residents and promotes communications with the community. For example, he has encouraged developer's to conduct public meetings. He is present and participates in Town functions beyond business hours and Council meetings. In addition, Mr. O'Keefe has guided the Council to expand the Development Review Committee (a staff function) to require public comment.</p> <p>The Town would benefit from more direct communication/presentation. A focused style of communication would assist cost/benefit discussions. I understand that most topics require some history or background, so everyone begins the conversation at the same point, but the offering is often too lengthy and confusing.</p>	

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## Town Manager Performance Evaluation

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<b>4. Policy Execution</b>		<b>Rating:</b>
	a. Understands, supports, and enforces the organization’s ordinances, policies, and procedures.	3
	b. Clearly identifies and communicates expectations to the organization regarding the implementation of policies enacted by the Board.	3
	c. Implements Board actions in accordance with the intent of the Board.	3
	d. Supports the actions of the Board after a decision has been reached, both inside and outside the organization.	3
	e. Helps internal and external stakeholders to achieve common objectives within the parameters of established Board policies.	3
<b>Total Rating for this Performance Dimension:</b>		15
<b>Comment:</b>	Mr. O’Keefe is up to date on and enforces the Town’s Policies. He updated the Purchasing Policy after Council approval and is working with the Directors on the Personnel Policy. He has also received information from the Florida League of Cities on the new/changed State Statutes that impact our municipality. In addition, he manages the Town’s Emergency Operations Center efforts in coordination with Lake County.	

## Town Manager Performance Evaluation

<b>5. Intergovernmental Relations</b>		<b>Rating:</b>
	a. Promotes a positive working relationship with other governmental entities.	2
	b. Engages with other local, regional, state, and federal agencies to accomplish local initiatives.	3
	c. Positively and effectively represents the organization and its interests when working with other governmental agencies.	3
	d. Maintains awareness of laws and other issues affecting other governmental agencies which may affect the organization.	3
	e. Is willing to share resources or information with other governmental agencies as appropriate.	3
<b>Total Rating for this Performance Dimension:</b>		14
<b>Comment:</b>	<p>After working with the Town’s Police Chief and Lieutenant to understand the scope of the SRO agreement and establish the expenses for each SRO Mr. O’Keefe continued to treat the effort as a negotiation. And after clarification from the County CFO, Superintendent of Schools and Lake Hills Administrator, Dr. Meyers, Mr. O’Keefe was still unwilling to acknowledge that his interpretation of the agreement was incorrect. His actions strained relationships with staff and County executives.</p> <p>Mr. O’Keefe brought a wealth of relationships and knowledge of Lake County working, especially the Library. He belongs to the Florida City County Managers Association and International City Managers Association and brings these relationships and learnings to his efforts for the Town. His approach in pursuing the County Library Impact fees for the Town was not appreciated by County Library staff but resulted in a reassessment to correct the impact fee distribution process which was good.</p> <p>Mr. O’Keefe has expanded his relationships enabling opportunities such as a potential wastewater joint venture with Groveland and/or Tavares.</p>	

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## Town Manager Performance Evaluation

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<b>6. Staffing and Management</b>		<b>Rating:</b>
	a. Recruits and retains competent personnel for Town positions.	3
	b. Is aware of staff weaknesses and works to improve their performance.	2
	c. Promotes training and development opportunities for employees at all levels of the organization.	3
	d. Stays accurately informed and concerned about employee relations.	2
	e. Is able to discern when it is necessary to assume charge of situations that would normally be handled by a subordinate and when it is necessary to only provide guidance and support.	3
<b>Total Rating for this Performance Dimension:</b>		13
<b>Comment:</b>	<p>Promptly after her hire, Mr. O’Keefe was made aware of the Finance Supervisor’s unwillingness to work with other staff but she was allowed to continue in “it’s not my job” and “I’ll have to wait for my Director to tell me to do it” mode for months. For example, when asked about department duties e.g. bank reconciliation, her first response was that she didn’t have access to the bank statements thought she was shown where the files were stored her first week. She was willing to run reports, produce complex spreadsheets and discuss improvement for the accounting practices but she would not respond to simple requests, that delay was costly both in personnel hours and staff frustration. This attitude and lack of performance continued for several months causing issues for staff.</p> <p>The Town Manager has supported the Town Clerk’s certification classes and work. Encouraged Public Services staff to complete the Traffic certification and supported duty specific training throughout the departments.</p>	

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## Town Manager Performance Evaluation

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<b>7. Fiscal Management</b>		<b>Rating:</b>
	a. Prepares a balanced budget to provide services at a level directed by the Board.	3
	b. Ensures that the budget meets the operational needs of the organization and makes the best possible use of available funds.	3
	c. Prepares the budget in an intelligent but readable format.	3
	d. Submits the proposed budget in a timely manner that allows for an appropriate review period.	3
	e. Appropriately monitors and manages the fiscal activities of the organization throughout the fiscal year.	2
<b>Total Rating for this Performance Dimension:</b>		14
<b>Comment:</b>	<p>The materials for the 2024 budget preparation meetings were provided with sufficient review time.</p> <p>Mr. O’Keefe has implemented many accounting improvements including enhanced financial reporting by implementing the use of object codes for discrete tracking of project expenses.</p> <p>The 2023 budget and first budget amendment did not disclose an omission of grant expenses. Mr. O’Keefe postponed/denied the hiring of replacement and a budgeted position causing strain on the department, jeopardizing their ability to fulfill their duties.</p>	

## Town Manager Performance Evaluation

<b>8. Planning and Organizational Development</b>		<b>Rating:</b>
a.	Works with the Board, community leaders, and other stakeholders to develop a clear vision, mission, values, and objectives for the organization.	3
b.	Effectively prioritizes goals and objectives in order to ensure that the organization is doing "first things first" in support of its strategic plan.	2
c.	Maintains a healthy and productive organizational culture focused on customer service and responsible stewardship of the organization's resources.	3
d.	Has a capacity for and encourages innovation.	3
e.	Reviews ordinances, policies, and procedures periodically to suggest improvements.	3
<b>Total Rating for this Performance Dimension:</b>		14
Comment:	<p>Mr. O'Keefe has explored many options to fulfill the Town Wastewater objective. He continues to develop and pursue new avenues to achieve this primary goal.</p> <p>Mr. O'Keefe worked with the Council on the Capital Improvement Plan (CIP) and had each Councilor identify five goals for the Town. He did not provide impact analysis or suggest scope definition; thus, we have too many expectations and insufficient resources.</p> <p>The Council approved and filled the Town Manager position to ensure progress on the goals/projects and consistency in execution of tasks to meet deliverables. It feels as though the Town Manager is waiting for the Council to tell him how do that and the Council is waiting for him to tell us how he is going to do that.</p>	

## Town Manager Performance Evaluation

<b>9. Leadership and Decision-Making</b>		<b>Rating:</b>
a. Leads the organization by example in adhering to its established policies, rules, and procedures, and ensures that subordinates do the same.		3
b. Acknowledges the efforts of others and gives appropriate credit for their accomplishments.		3
c. Is effective at building consensus among stakeholders on new or unpopular policies or initiatives.		3
d. Makes logical decisions based on a thorough review of available information and soliciting input from appropriate sources.		3
e. Is able to effectively make decisions rapidly in situations where information is limited, and the outcome might be uncertain.		2
<b>Total Rating for this Performance Dimension:</b>		
Comment:	<p>In most cases Mr. O’Keefe meets the above, notable exceptions are stated in previous sections of this document.</p> <p>Mr. O’Keefe often hesitates to provide assessment, presenting matters and waiting for the Council to discern the impact of the decisions. The Council and Town would greatly benefit from a more proactive cause/effect process as was evidenced in the staff recommendation to eliminate the non-potable meter Utility fee.</p>	14

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## Town Manager Performance Evaluation

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<b>10. Individual Characteristics</b>		<b>Rating:</b>
a. Consistently acts with professionalism and courtesy, including prompt attendance at meetings, returning phone calls/messages, and adhering to scheduled appointments.		3
b. Ensures that all business conducted by the organization is free of conflicts of interest or practices that might be construed as illegal, unethical, or unprofessional.		3
c. Is energetic, cooperative, and willing to spend whatever time is necessary to do a good job.		4
d. Has the capacity to listen to others and to recognize their interests.		3
e. Avoids political positions, partisanship, and unnecessary controversy.		3
<b>Total Rating for this Performance Dimension:</b>		<b>16</b>
Comment:	Mr. O’Keefe works well beyond the normal work week and coordinates with the Town Clerk and Directors to ensure the Town is functioning. He sometimes loses focus or does not follow-up on things of importance. For example, the lengthy delay in identifying and pursuing grants, the Council request for information on the suggested new impact fees and status on the hydraulic study for the existing water plant.	

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## Town Manager Performance Evaluation

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### Summary:

Performance Dimension:	Overall Rating:	
1. Professional Skills and Expertise		13
2. Council/Commission Relations		16
3. Citizen and Public Relations		15
4. Policy Execution		15
5. Intergovernmental Relations		14
6. Staffing and Management		13
7. Fiscal Management		14
8. Planning and Organizational Development		14
9. Leadership and Decision-Making		15
10. Individual Characteristics		16

Total Score: 144

**Total Average Rating: 2.88**

Date: September 21, 2023