



Town of Lake Park Town Commission

Agenda Request Form

Meeting Date: April 19, 2023,

Agenda Item No.

Agenda Title: SMART Goal Setting Evaluation Form to evaluate the performance of the Town Manager. The Form is in DRAFT Form for input and comment for the May

- | | | | |
|-------------------------------------|---|--------------------------|----------------|
| <input type="checkbox"/> | SPECIAL /REPORTS | <input type="checkbox"/> | CONSENT AGENDA |
| <input type="checkbox"/> | BOARD APPOINTMENT | <input type="checkbox"/> | OLD BUSINESS |
| <input type="checkbox"/> | PUBLIC HEARING ORDINANCE ON 1 st READING | | |
| <input checked="" type="checkbox"/> | NEW BUSINESS | | |
| <input type="checkbox"/> | OTHER: WORKSHOP _____ | | |

Approved by Town Manager John D'Agostino Digitally signed by John D'Agostino
DN: cn=John D'Agostino, o=Town of Lake Park, ou=Town Manager, email=jdagostino@lakeparkflorida.gov, c=US
Date: 2023.04.10 16:35:42 -04'00' Date: _____

John O. D'Agostino, Town Manager

Name/Title

Originating Department: Town Manager	Costs: \$ 0 Funding Source: General Fund Acct. # <input type="checkbox"/> Finance _____	Attachments: <ul style="list-style-type: none"> • SMART Goal Evaluation Form • Notes from Commission Members who met with the Town Manager to formulate goals to be achieved
Advertised: Date: _____ Paper: _____ <input checked="" type="checkbox"/> Not Required JOD	All parties with interest in this agenda item are notified of the meeting date and time.	___ Yes, I Notified everyone OR ___ JOD ___ Not applicable in this case Please initial one.

Summary Explanation/Background: In 2021, the Town Commission approved moving forward with a SMART Performance assessment tool that was Goal oriented. Attached is the evaluation form that established the evaluation categories approved by the Town Commission. Those goal specifications are as follows: Mayor O'Rourke, Community Development, Vice Mayor Kim Glas-Castro, Infrastructure, Commissioner Flaherty,

Financial Management, Commissioner Linden, Communications and Commissioner Michaud, now Mayor Michaud Community Engagement.

Sometime has passed since the assignment of goal categories. Erin Flaherty was replaced by Commissioner Mary Taylor and recently Mayor O'Rourke was replaced by now Mayor Roger Michaud. The vacant seat was recently filled by newly elected Commissioner Judith Thomas.

Commissioner Taylor agreed to take on Financial Management. However, I plan to discuss the SMART Goal setting initiative created by the Town Commission with Commissioner Thomas on Tuesday of this week (the week of 4/10/23 through 4/15/2023). The only goal category not assigned is Community Development. If Commissioner Thomas decides to take on this category, I will work with her to develop specific goals for the Community Development category.

Recommended Motion: No motion is necessary other than input on the category of goals.

SMART Goal Setting Guide Sheet

Following are components of an effective goal – one that describes performance standards that will “tell us what good behavior looks like.” The SMART acronym can help us remember these components.

Specific The goal should identify a specific action or event that will take place.

Measurable The goal and its benefits should be quantifiable.

Achievable The goal should be attainable given available resources.

Realistic The goal should require you to stretch some, but allow the likelihood of success.

Timely The goal should state the time period in which it will be accomplished.

Here are some tips that can help you set effective goals:

1. Develop several goals. A list of five to seven items gives you several things to work on over a period of time.
2. State goals as declarations of intention, not items on a wish list. "I want to apply to three schools" lacks power. "I will apply to three schools," is intentional and powerful.
3. Attach a date to each goal. State what you intend to accomplish and by when. A good list should include some short-term and some long-term goals. You may want a few goals for the year, and some for two- or three-month intervals.
4. Be specific. "To find a job" is too general; "to find and research five job openings before the end of the month" is better. Sometimes a more general goal can become the long-term aim, and you can identify some more specific goals to take you there.
5. Share your goals with someone who cares if you reach them. Sharing your intentions with your parents, your best friend, or your teacher will help ensure success.
6. Write down your goals and put them where you will see them. The more often you read your list, the more results you get.
7. Review and revise your list. Experiment with different ways of stating your goals. Goal setting improves with practice, so play around with it.

Writing an Effective Goal Statement

Rules for writing goal statements:

1. Use clear, specific language.
2. Start your goal statement with TO + a VERB
3. Write your goal statement using SMART Goal Criteria
4. Avoid using negative language. Think positive!

An example of a goal statement:

- *To run the mini marathon in May and complete the 10 mile race in under 1 hour to beat my personal best time.*

Notice how the above example begins with the word “To”, includes the verb “run”, and tells what (the marathon), why (to beat personal best time) and when (May).

Activity

Use this worksheet to identify the specific SMART criteria you will use to write your goal statement.

What is your basic goal? _____

1. Is it **specific**? (Who? What? Where? When? Why?)

S _____

2. Is it **measurable**? How will I measure progress? (How many? How much?)

M _____

3. Is it **attainable**? (Can this really happen? Attainable with enough effort? What steps are involved?)

A _____

4. Is it **realistic**? (What knowledge's, skills, and abilities are necessary to reach this goal?)

R _____

5. Is it **timebound**? (Can I set fixed deadlines? What are the deadlines?)

T _____

My Goal Statement

Use the SMART worksheet you just completed and the rules above for writing a goal statement. This should be a work-related goal that you would like to achieve in 12 months or less. Repeat this exercise as needed to write other goal statements.



Town of Lake Park

ANNUAL PERFORMANCE EVALUATION FORM TOWN MANAGER

Each member of the Town Commission should complete this form, rating the Town Manager's performance in each of the areas noted below. Spaces are also provided for additional comments. *(Please do not complete in pencil.)*

Evaluator's Name

EVALUATION PERIOD _____

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COMMUNICATIONS

Assigned to Commissioner Linden

- 1) How effective is the Manager Communicating with Commission members?
- 2) How effective is the Manager communicating with residents during public meetings and during workshop settings?
- 3) How effective is the Manager at communicating a vision and direction for the town resulting in positive change?
- 4) How flexible is the Manager in his ability to understand community needs and to communicate strategies (including programs and services) to meet the expectations of the community and the Commission?

Goal: Weekly meetings with Commission members who request time with the Town Manager to review upcoming agenda items, update the Commission on the weekly status of the affairs of the Town, current projects and possible future projects. Updates at regular Commission meetings are not included (Why?).

Goal: Staff communications provide written monthly update reports from each Department Head shared with Commission members. (that happens now). Update Commission members on new hires within a week of new hires, retirements, resignations, or terminations. Update current and future special events sponsored by the Town

Goal: Improve communications with residents by increasing the number of multimedia followers. Quarterly meetings with business owners in and outside of the CRA

Rating

1 2 3 4 5 (circle one)

**FISCAL MANAGEMENT
GUIDELINES**
Assigned to Commissioner Taylor

- 1) How effective is the Manager in submitting a balanced budget that provides for municipal services such as Public Works, Recreation, Library, Special Events, Community Development (including Code Compliance), Recreation, CRA, Storm Water, Sanitation, Finance, as well as the services of the Palm Beach County Sheriff's Office?
- 2) How effective is the Manager in pursuing grant initiatives to supplement the operating budget of the Town or its enterprise accounts (Sanitation, Stormwater, Streets and Roads, Marina and CRA)?
- 3) How accurately does the Manager's budget reflect the needs of the community and the directives of the Town Commission?
- 4) How effective is the Manager in enabling staff to exercise creativity in the way funding capital projects are secured and support the operating budget?
- 5) Does the Manager Exercise proper management of revenues and expenditures, balancing the budget year-end and fund balances in enterprise accounts and total fund balances for the General Fund?

Goal: Submit a balanced operating budget for FY 23-24 including all enterprise accounts by September 30, 2023.

Goal: Effectively pursue grant initiatives to increase the operating budget of the town by a minimum of \$250,000 per year.

Goal: Submit an operating budget that meets the directives of the Town Commission, the needs of the community by developing an increased amount of programs and services.

Goal: To exercise proper management of Revenues and Expenditures to increase fund balance in non-restricted accounts at the end of each fiscal year.

Rating

1 2 3 4 5 (circle one)

COMMUNITY ENGAGEMENT

Mayor Roger Michaud

- 1) How effectively does the Manager and Staff utilize media platforms and in-person communication with Residents?
- 2) How effectively does the Manager communicate with Commission Members?
- 3) How effective are the Manager's presentation skills at workshops, public meetings with residents in attendance?
- 4) Are the Manager communication skills clear and concise with Commission members?

Goal: Establish Community Block Parties using the Community Grant Program to help residents with Food items. Create up to 4 block parties in Lake Park.

Goal: Create festivals in the CRA to help businesses within the CRA. Create at least one major Festival during your review period.

Goal: Create Up to Four Community Forums on the following topics, Affordable Housing, Green Infrastructure Initiatives, Code Ordinances (Outdated), Responsible Development in Lake Park.

Rating

1 2 3 4 5 (circle one)

ECONOMIC AND COMMUNITY DEVELOPMENT

Assignment was to Mayor O'Rourke

- 1) What initiatives has the Town Manger undertaken to increase the number of new businesses in the Town of Lake Park?
- 2) Since an increase in new businesses also contributes to the financial impact on revenue growth for the operating budget. It is anticipated to realize an economic impact in revenue from one fiscal year to the next of an additional \$250,000 per fiscal year.
- 3) Create incentives and ordinance changes that support responsible development by increasing density in areas of the Town suitable for density development, outside of the residential edge.
- 4) Establish conceptual plans for a community center at Bert Bostrom Park which meets the programmatic and recreational needs of community.

Goal: To attract new development that will increase revenue to the Town's operating budget of \$200,000 per fiscal year.

Goal: Increase permit revenue to the town in each year by an estimated \$100,000 to 200,000.

Goal: Create an expedited permit process for High Density Projects that bring revenue increases of over \$150,000 in tax revenue yearly.

Rating

1 2 3 4 5 (circle one)

INFASTRUCTURE AND CAPITAL PROJECTS

Vice-Mayor Kim Glas-Castro

- 1) How effective is the Manager at Managing projects approved by the Town Commission?
- 2) How effective is the Manager at anticipating project delays and developing alternative time lines for project completion under the control of the Municipality?
- 3) How effective is the Manager at motivating staff to work towards implementing infrastructure repairs approved by the Town Commission through the budget process?
- 4) How effective has the Manager been in securing alternative funding sources (grants) to achieve infrastructure financing for capital projects such as the approved Master Drainage Plan, Seawall upgrades, Road repairs, expansion of drainage alternatives such as bio-swales, rain gardens, FDOT US Route One drainage project etc.

Goal: Update every other month ongoing infrastructure projects approved and funded by the Town Commission.

Goal: Implement such improvements during the fiscal year, but no later than the end of the fiscal year unless delayed at which point delays must be

communicated to the Town Commission with new timelines established.
(i.e. pipelining, projects budgeted within the fiscal year)

Goal: Provide a general project schedule the first of the new fiscal year and the project schedule identifies projects to be completed within the fiscal year and other projects that are projected to be completed beyond the fiscal year (multiyear projects).

Rating

1

2

3

4

5

(circle one)

ADDITIONAL SUMMARY COMMENTS

SALARY PERCENTAGE RECOMMENDATION:

(Pursuant to Section 6 in the Fifth Amendment to the Town Manager's Employment Agreement, the Town Manager shall be entitled to an annual increase in salary of up to 5 percent.)

EVALUATOR'S SIGNATURE

DATE

John D'Agostino 2021/22 Objectives

Form JD-A

Communications

1. Communications with Commissioners and CRA members

- a. A weekly meeting with each commissioner for approximately 1 hour, in person or by phone/zoom to discuss the current affairs of the Town, including upcoming agenda items.
- b. A weekly update of all current projects, (form JD-C) and potential future projects.
- c. A monthly call to CRA Board Members.
- d. This does not include any updates during or at a regular Commissions/CRA meeting.

2. Communications with Commissioners on prospective and ongoing business development.

- a. Any meetings with Staff, or in person, by phone, e-mail or regular mail that involves business openings, business closings, meetings with developers, or prospective business interests in Lake Park. This would be included in the regular scheduled weekly meeting with the commissioners.

3. Communications with Staff

- a. A written monthly update report from each Department Head that is shared with each commissioner.
- b. Updating, within a week, on an as needed bases, on any Department Head new hires, resignations, retirements and terminations.
- c. Updating on any current and future special events sponsored by or supported by the Town. This would be included in the regular scheduled weekly meeting with the commissioners.

4. Communications with Residents/Business

- a. Improve communications with residents by increasing the number of multimedia followers.
- b. Quarterly meeting with businesses in and out of the CRA.
- c. One or more, in-person, activities for the community monthly.

5. Others

- a. Share e-mail lists between code red?
- b. Sharing e-mail lists between Constant Contact?

Mayor Goals

5/11, 2pm

Item 24.

Mayor

* Goal - To attract New Development that will increase Revenue to the Town and to determine the Revenue ^{increase} ~~Amount~~ ~~in year 1~~ ~~from the~~ ~~through year 2~~. Purions year. May of 22 - May of 23

* Goal To Increase ~~on~~ Rev Permut Revenue to the Town ~~each~~ in year 1. (May of 22 - May of 23)

* Goal to Create an expedited Permit Process on High Density Projects that Bring a revenue increase in excess of 150,000 Dollars yearly in Tax Revenue.

Kim Roth

① To update every other month on ongoing Infrastructure Projects approved and funded by Town Commission.

② To implement Capital Projects, infrastructure repairs in the Town Budget by the end of the Fiscal Year

= Price Union

— Project Budgeted within the Fiscal

③ To develop a Project Schedule that identifies Projects to be completed in a ~~12 month~~ ^{1st of the FY} completion and also identifies Projects that require multiple year implementation

*Gone measure - All Considering the same thing. Clear.

will submit a Finance ~~the~~ operating Budget

① To balance Budget for FY 22-23 including enterprise Accounts.

② To effectively Pursue Grant Initiatives that increases the operating Budget of the Town by a minimum of 250,000 - 500,000 in FY 22-23

work ③ To submit a Balanced Budget that meets the Directives of the Town Commission and meets the needs of the Community by developing ~~increased amount of~~ ~~Programs~~ and Services. - measures

④ To exercise Proper Mgmt Revenues and Expenditures to maintain Balance in accounts at the end of each F.Y.

Roger Michaud

Goals for Community Engagement.

Item 24.

Community block parties: engagement with neighbors.

~Festivals in the CRA

Community Focus Forums. In Pocket Parks:

Topics/workforce housing, environmental initiatives, code ordinances are outdated.