

CITY OF LAKE WORTH BEACH CITY MANAGER PERFORMANCE EVALUATION

RATING:

1. Unsatisfactory
2. Needs strengthening
3. Satisfactory Performance
4. Good Performance
5. Outstanding Performance

COMPLETED BY: MAYOR

I. Organizational Management	RATING				
	1	2	3	4	5
1. Provides that the organization complies with appropriate established board procedures.				✓	
2. Plans and organizes ongoing programs and services for the City Commission.				✓	
3. Plans and organizes areas of concern brought to the attention of the City Manager by the City Commission or responses to public requests.			✓	✓	
4. Establishes a standard of excellence based on industry best practices for the organization.				✓	
COMMENTS/SUGGESTIONS:					
TOTAL SCORE <u>15</u> ÷ 4 = <u>3.7</u>					
II. Fiscal Management and Budgeting	RATING				
	1	2	3	4	5
1. Plans and prepares the annual budget in accordance with the priorities established by the Mayor and the City Commission with documentation and full explanation of the annual budget.				✓	
2. Administers the adopted budget within the framework of the approved revenues and expenditures.				✓	
3. Plans and provides for a system of reports, as requested, for the City Commission to evaluate expenses and revenues.			✓		
4. Prepares and presents to the City Commission appropriate budgetary transfers, as necessary.				✓	
5. Ensures actions and decisions reflect an appropriate level of responsibility for financial planning and accountability.				✓	
6. Plans for, organizes and supervises the most economical utilizations of staff, materials and equipment for City services.				✓	

COMMENTS/SUGGESTIONS:TOTAL SCORE $23 \div 6 = 3.8$ **III. Intermediate and Long-Range Planning****RATING**

1	2	3	4	5
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1. Carries out intermediate and long-range planning concerns approved by the City Commission.				✓	
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2. Plans and organizes maximum utilization and maintenance of City owned assets.				✓	
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3. Plans and organizes a program of addressing the current needs and requirements of infrastructure and infrastructure needs of the future.				✓	
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4. Progress towards implementing the City Commission's vision of innovation, problem solving and solution-oriented action.				✓	
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5. Keeps the Mayor and City Commission aware of new or impending legislation, potential grants and developments in public policy, which may have an impact on the city.				✓	
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6. Maintains knowledge of new technologies, systems and methods that may enhance the City's operations.				✓	
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COMMENTS/SUGGESTIONS:TOTAL SCORE $24 \div 6 = 4$ **IV. Intergovernmental Relationships****RATING**

1	2	3	4	5
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1. Maintains awareness of developments and plans in other jurisdictions, which may impact the City.					✓
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2. Maintains communication with governmental jurisdictions in area of service that improves or enhances City programs.					✓
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3. Initiates communication with other governmental entities or outside parties, which the City may be involved with or become involved.					✓
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COMMENTS/SUGGESTIONS:TOTAL SCORE $15 \div 3 = 5$

V. Relationship with the Public	RATING				
	1	2	3	4	5
1. Establishes and maintains an image of the City of Lake Worth Beach to the community that represents service, enthusiasm and professionalism.					✓
2. Ensures that an attitude and feeling of helpfulness, courtesy and sensitivity to perception exist in employees coming in contact with the public.		✓			
3. Makes an effort to understand issues, concerns, and the values of the community.				✓	
4. Meets with and listens to members of the community to discuss concerns and strives to understand their interests.				✓	
5. Establishes and maintains a liaison with private organizations, service groups or individuals involved in areas of concern that relate to the service or activities of the City.				✓	
6. Promotes and provides information to public inquiries regarding activities, services or potential employment development with the City.			✓		
7. Assures that prompt and accurate information is provided to the public as appropriate.				✓	
COMMENTS/SUGGESTIONS:					
TOTAL SCORE $26 \div 7 = 3.7$					
VI. Management of Employee Relationship	RATING				
	1	2	3	4	5
1. Plans, organizes and maintains training of employees through in-house training or outside training.				✓	
2. Maintains regular staff meetings.					✓
3. Maintains contact and professional interaction with subordinates at all levels of the organization.					✓
4. Encourages teamwork, innovation, and effective problem-solving among the staff members.					✓
5. Maintains an organization that is efficient, helpful and courteous to the employees.					✓
6. Establishes and maintains high standards for hiring and retaining employees.					✓

COMMENTS/SUGGESTIONS:TOTAL SCORE $29 \div 6 = 4.83$ **VII. Relationship with City Commission****RATING**

1 2 3 4 5

1. Maintains effective communication, both verbal and written with the City Commission.

✓

2. Maintains availability to the City Commission.

✓

3. Provides information needed for City Commission action in a timely manner and is prepared to answer questions of the City Commission.

✓

4. Provides regular updates to the Council, keeping them informed about current and critical issues.

✓

5. Provides for clear presentations to the City Commission in the most concise, clear and comprehensive manner possible.

✓

6. Provides the City Commission with various perspectives of an issue and provides a recommendation and reason to support that recommendation.

✓

7. Implements City Commission actions in accordance with the intent of the Commission and supports the actions after a decision has been reached, both inside and outside the organization.

✓

COMMENTS/SUGGESTIONS:TOTAL SCORE $29 \div 7 = 4.14$ **VIII. Professional Development****RATING**

1 2 3 4 5

1. Is the City Manager viewed with respect as compared to others in Public Administration?

✓

2. Does the City Manager enthusiastically seek and support professional improvement through pertinent seminars and conferences?

✓

3. Does the City Manager deal effectively with other governmental managers?

✓

4. Is the City Manager always interested in learning new techniques or envisioning new ways to conduct business?

✓

COMMENTS/SUGGESTIONS:TOTAL SCORE $20 \div 4 = 5$ **RATING**

IX. Personal Characteristics

	1	2	3	4	5
1. Imagination: Does the City Manager show originality in approaching problems? Is she able to visualize the implications of various approaches?					✓
2. Objectivity: Is the City Manager unemotional and unbiased? Does she take a rational viewpoint based on facts and qualified opinions?					✓
3. Drive: Is the City Manager energetic, willing to spend whatever time is necessary to do a good job?					✓
4. Decisiveness: Is the City Manager able to reach timely decisions and initiate action?					✓
5. Attitude: Is the City Manager enthusiastic, cooperative and willing to adapt?					✓
COMMENTS/SUGGESTIONS:					
TOTAL SCORE $25 \div 5 = 5$					

Tabulation: Total of 9 categories (average) = $\frac{206}{9} = 39.1$
Average

ACHIEVEMENTS

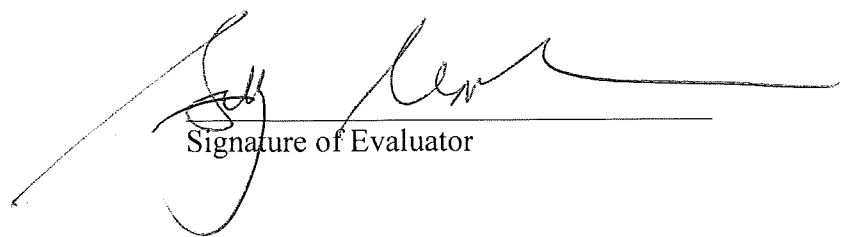
List the top three achievements or strong points of the City Manager for the past twelve (12) months.

Please see
attached notes

FUTURE DEVELOPMENT

List three performance objectives for the City Manager that you feel are the most important targets for this year.

Please see attached notes


Signature of Evaluator

Mayor Resch comments:

- I. ORGANIZATIONAL MANAGEMENT: Ms. Davis came to the position in the middle of a big change in the whole commission and management of the city. It is a formidable job to begin the process of assessing the status of the city, the staff, conditions which are currently "on top of the pile", establishing relationships with her staff, other agencies, the public and not least of all, the commission. Dealing with five different personalities is a challenge in the best of circumstances.

- I. FISCAL MANAGEMENT AND BUDGETING: Under Ms. Davis supervision, the budget process has become much more transparent and user friendly. The budget is done on time, with plenty of opportunities for the commission to meet with her and the Finance Director to ask any questions and get what clarifications may be needed. The proposed budgets are given to the commission in plenty of time to review and assess and ask questions for clarification, etc.

If reports are requested on any specific financial item, I find that She responds to my question, and if she isn't aware of the answer at that moment, she finds out the status.

- II. INTERMEDIATE AND LONG RANGE PLANNING: Lake Worth Beach has many moving parts; Lots of balls in the air at all times. Ms. Davis has to rely on her senior staff to ensure that things are moving smoothly. She is a skillful problem solver; she is able to assess a situation and work with staff to find a solution which is workable.

- III. INTERGOVERNMENTAL RELATIONSHIPS: This is an area in which Ms. Davis excels. Within a short time of coming to the city, she began to develop great working relationships with folks from other cities. She regularly attends the Palm Beach County League of Cities casual monthly lunches for our district, as well as the monthly larger Palm Beach County League lunch and learn meetings all over the county. This is an excellent way for her to meet with and get to know other city managers and elected officials. This has benefitted the city in that she can pick up the phone and speak with people who can help. Especially important is the relationship she has established with Verdenia Baker, the Palm Beach County Administrator. Often the city and the county have interactions, and their relationship is a very helpful one.

- IV. RELATIONSHIP WITH THE PUBLIC: Ms. Davis presents a very professional and enthusiastic persona to the public. She is impeccable in her appearance, and has an open and friendly attitude when dealing with people. I know that she regularly meets with members of the public who request her time. She meets with and has established relationships with local groups. Ms. Davis has attended many public events, neighborhood picnics, ribbon cuttings, etc.

- V. **MANAGEMENT OF EMPLOYEE RELATIONSHIPS:** After being here a while, Ms. Davis realized that for some time, there was a very loose practice of hiring without any approval from the city manager. This led to a situation where folks were hired, but there was no communication between departments as to funding those positions. Ms. Davis has instituted a protocol wherein she has her eyes on every hire, and assures that finance knows about it, determines that there is funding for the position, and sets up that funding. This old practice led at one point to a shortfall in funding some positions that had been filled without the finance department knowing about it. Systems and those kinds of protocols keep the organization on a steady course.

There was one situation which Ms. Davis showed extraordinary leadership. The finance department was having some difficulties in personnel and process. Ms. Davis recognized the problem and handled it in a most professional and even-handed way. She undertook a thorough investigation of the problem, interviewed staff, reviewed past budget reports and state audits which had been submitted late on more than one occasion, and determined that the best course of action was a change in leadership of that department. She successfully recruited our current finance director to return to the city (he had left to work for another municipality) as finance director. Since that change, the audits are on time, the employees are more content in their work, and the department is running smoothly.

From my perspective, the budget reports, proposed budgets have become much more user friendly, more understandable and easier to understand.

- VI. **RELATIONSHIP WITH CITY COMMISSION:** My experience with Ms. Davis and her communication with me has been very positive. She keeps me up to date either in person or by phone or email with any updates. She is very available to me. Of course I don't know how this works with the others.

When I bring an idea to her, she listens, and responds as best as she can. We come in with our ideas and she has to vet them as best she can as to whether they can work or not .

There have been one or two instances where she misstepped, but with no ill intent. As soon as she realized a problem, she was quick to resolve it. The Head Start was one, the letter she sent was a little harsh, however in fact she had not been contacted about the program wanting to extend the lease, which they knew was expiring. When she realized the problem, she reached out to them to work on a solution.

One really revealing event was when she was told by staff that expenditures which needed approval had been made without that approval. Each expenditure (or most of them) were under the limit required for approval, and she could very well have kept the problem quiet by resting on that fact. She did not, however, she immediately brought it to our attention. It became an agenda item which did get approval for the expenditures. Her honesty in this

situation was a very telling moment for me; she faced the problem head on, was open about it and did nothing to conceal the problem. Well done.

VII. PROFESSIONAL DEVELOPMENT; Ms. Davis is very active in her professional organizations and attends conferences to develop her skills. I have observed her interactions with others in the field and it is obvious that she is respected. Ms. Davis is a wonderful "face" of the city.

VIII. PERSONAL CHARACTERISTICS; I have given 5's in this category. Lake Worth Beach is not an easy city to manage. I'm sure she feels at time like she is herding cats! She is consistently professional and calm (even in the face of being disrespected in public and behind closed doors.)

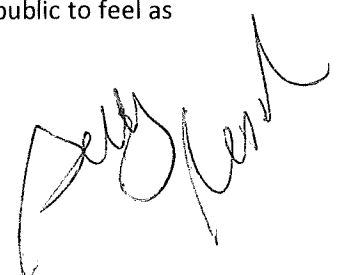
She is a good listener; she is fair and balanced in her approach to things that come her way.

ACHIEVEMENTS:

1. Walking into a chaotic situation and grabbing hold of it in a very timely manner. Dealing effectively and timely when she sees a problem like the trouble with the finance departments.
2. Creating protocols for staff to follow to run a tighter city.
3. Using her experience to asses and deal with a lot of new situations in a very short time, and dealing with a culture that had been established for a long time

FUTURE DEVELOPMENT: when she came to us, her family was still in MS. That was very challenging for her as she is a very devoted family person. That may have had some impact on my ideas.

1. To develop a more effective way to communicate with the commission when a situation comes up. However, we do have weekly meetings with her, that is our opportunity to timely be informed of ongoing issues and situations. We cannot expect her to call us individually each time something comes up unless it is catastrophic. Keeping our weekly one on ones is essential to helping her keep us informed.
2. There have been a couple of occasions where some idea or request has taken longer than I had hoped. However, when we discuss this in our conversations, there is usually a good reason for that and we work it out in a professional manner. The website is one example, it needs work that has taken longer than expected.
3. To continue to build and strengthen our staff. To work to improve customer service; the culture of how staff deals with the public. This is an ongoing problem with some employees. I know she is working on this. I mention it because it is so important for our public to feel as though they are respected.

A handwritten signature in black ink, appearing to read "P. Davis", is located in the bottom right corner of the page.