

Estero Village

Manager

Performance

Evaluation

VILLAGE MANAGER PERFORMANCE EVALUATION
Average of Councilmember's Evaluations

	Batos	Levitan	Boesch	Errington	Brown	Ribble	Wilson	Average
Organizational Management	5	5	5	4	4	5	5	4.71
Fiscal Management	5	5	5	4.25	4.4	5	5	4.80
Planning	5	5	5	4.25	4.25	5	5	4.78
Staffing	4.75	4.5	5	4.25	4	5	5	4.64
Management Effectiveness	4.75	5	4	4.50	4.25	5	4.75	4.60
Reporting	4.25	4.5	5	4.25	4.5	5	4.25	4.53
Relationship with Council	5	5	4	4	4.6	5	5	4.65
Citizen and Intergovernmental Relations	5	5	5	4	4.8	5	4.9	4.81
Staff Interaction	4.5	5	5	4.5	4.5	5	5	4.78
Professional Development / Personal Characteristics	4.83	5	5	4.57	5	5	5	4.91
Policy Execution	5	5	5	4.43	4.8	5	5	4.89
Overall Average	4.825	4.9	4.8	4.57	4.39	5	4.9	4.76

Estero Village Manager Performance Evaluation

Evaluator
Nick Bates
Date
5/13/16

Organizational Management	Rate
1. Plans and organizes work that implements the policies of city council.	5
2. Initiates and maintains effective professional relationships with department heads.	5
3. Effectively utilizes resources.	5
4. Ability to manage, motivate, train personnel, provide leadership, encourage team atmosphere, manage resources, and set realistic goals and objectives.	5
Section Average	5

Fiscal Management	Rate
1. Plans and organizes the preparation of the annual budget using standard financial management procedures and documentation that conforms to the guidelines adopted by city council.	5
2. Administers the adopted budget within approved revenues and expenditures.	5
3. Plans, organizes and supervises the most effective use of manpower, materials, machinery and equipment.	5
4. Makes the best possible use of available funds, conscious of the need to operate the city efficiently and effectively.	5
Section Average	5

Although he has not gone through the entire process yet

Planning	Rate
1. Establishes and administers a planning process in anticipation of future needs, problems and issues.	5
2. Participates in the establishment of reasonable goals and objectives for the city and each department	5
3. Achieves specific goals and objectives in a timely manner.	5
4. Assists and coordinates with city council and staff in the implementation of city goals and objectives.	5
Section Average	5

Although we have not completed many planning it is hard to do

Staffing	Rate
1. Recruits and retains qualified and highly competent personnel.	4
2. Monitors performance of staff and initiates corrective action as needed to improve job performance.	5
3. Effectively manages employee benefits, compensation, career development, employee relations and union negotiations.	5
4. Evaluates personnel periodically and points out staff weaknesses and strengths.	5
Section Average	4.75

JUST NOW DOING THIS

Management Effectiveness	Rate
1. Has the ability to resolve the numerous conflicts inherent in municipal government, is a good negotiator.	4
2. Honest and fair, consistently open and straightforward.	5
3. Responds well to a changing world and local conditions and is adaptive.	5
4. Maintains and shares an appropriate sense of humor to lighten the load.	5
Section Average	4.75

STILL EARLY IN PROCESS

Reporting	Rate
1. Keeps the council well informed with concise written and oral communications.	5
2. Provides meeting backup package in a timely manner.	3
3. Provides sufficient backup information for agendas?	4
4. Prepares a sound agenda, which prevents trivial administrative matters from being reviewed by the council.	5
Section Average	4.25

SOME PROBLEMS IN THE AREA BUT NOT MY DOING

Relationship with Council	Rate
1. Willing to meet with council members, both scheduled and unscheduled meetings.	5
2. Carries out the directives of council as a whole rather than those of any one council member, but does recognize the concerns of the minority.	5
3. Does the city manager's office respond completely and in a timely manner to complaints and request from the mayor and city council?	5
4. Assists the council in resolving problems at the administrative level to avoid unnecessary council action.	5
5. Assists the council in establishing policy while acknowledging the ultimate authority of the council.	5
6. Informs the council of administrative developments.	5
7. Informs all council members of important issues and developments.	5
8. Assumes responsibility for staff performance.	5
9. Receptive to constructive criticism and advice.	5
Section Average	5

Citizen and Intergovernmental Relations	Rate
1. Handles citizens' questions and complaints in a professional and prompt manner.	5
2. Willing to meet with members of the community and discuss issues of concern.	5
3. Recognizes the public's right and need to be well informed.	5
4. Skillful with the news media, avoiding political position and partisanship.	5
5. Cooperates with the county, state and federal governments.	5
Section Average	5

Staff Interaction	Rate
1. Encourages department heads to make decisions within their own jurisdictions without city manager direct approval yet maintains general control of administrative operations.	4
2. Develops a friendly and informal relationship with the work force yet maintains the prestige and dignity of the city manager's office.	5
Section Average	4.5

Not long enough for complete evaluation

Professional Development / Personal Characteristics	Rate
1. Is continuing education to maintain professional development.	
2. Ethical: conforms to the high standards of the profession; is a member of the ICMA and knows, follows and promotes the "ICMA Code of Ethics"	5
3. Credits municipal accomplishments to the policy makers; does not feed personal ego.	5
4. Job Knowledge: Learns and understands the various skills and procedures of the job.	5
5. Composure, appearance, and attitude fitting for an individual in this executive position.	5
6. Anticipates problems and develops effective approaches for solving them.	4
7. Willing to try new ideas proposed by council or staff.	5
Section Average	4.83

To start & know
To know

Policy Execution	Rate
1. Accurately interprets the direction given by council.	5
2. Implements council actions in accordance with the intent of council.	5
3. Supports the actions of the city council after a decision is made.	5
4. Enforces city policies.	5
5. Understands the city's laws and ordinances.	5
6. Reviews enforcement procedures periodically to improve effectiveness.	
7. Offers workable alternatives to the council for changes in the law when an ordinance or policy proves impractical in actual administration.	
Section Average	5

To early to
evaluate

11 11 11

5

	Average
Organizational Management	5.0
Fiscal Management	5.0
Planning	5.0
Staffing	4.75
Management Effectiveness	4.75
Reporting	4.25
Relationship with Council	5.0
Citizen and Intergovernmental Relations	5.0
Staff Interaction	4.5
Professional Development / Personal Characteristics	4.83
Policy Execution	5.0
Overall Average	4.825

Rate each item in this evaluation based on the following scale.
 (1) Poor (2) Fair (3) Good (4) Very Good (5) Excellent

I feel that many of the questions would need a longer period of time to fairly evaluate the work. We should have waited 1 year to do this.

Fill-ins

1. What are the manager's most significant accomplishments during the past year?

- 1) Working To get CIP procedure established
- 2) " " " financial reserves established

2. What are the manager's strongest qualities?

- 1) Keeping council informed
- 2) Getting a feel of the community

3. What areas does the manager need to improve in? Recommendations.

1) Getting agenda's & packets out to Council & Public at least one week before mtg.
(Although these are sometimes out of his control)

4. Two things the manager does that you would like him to continue.

- 1) one on one updates with Council
- 2) Developing relationships with other City Mgrs

5. Two things the manager does that you would like him to discontinue.

?

6. Two things the Manager does not do you would like him to start.

- 1) Have an assistant mgr
- 2)

**Estero Village
Manager
Performance
Evaluation**

Evaluator
Howard Levitan
Date
5/6/2016

Village Manager Performance Evaluation
Evaluation Period

Organizational Management	Rate
1. Plans and organizes work that implements the policies of city council.	5
2. Initiates and maintains effective professional relationships with department heads.	5
3. Effectively utilizes resources.	5
4. Ability to manage, motivate, train personnel, provide leadership, encourage team atmosphere, manage resources, and set realistic goals and objectives.	5
Section Average	4.75 5

Fiscal Management	Rate
1. Plans and organizes the preparation of the annual budget using standard financial management procedures and documentation that conforms to the guidelines adopted by city council.	5
2. Administers the adopted budget within approved revenues and expenditures.	5
3. Plans, organizes and supervises the most effective use of manpower, materials, machinery and equipment.	5
4. Makes the best possible use of available funds, conscious of the need to operate the city efficiently and effectively.	5
Section Average	5

Planning	Rate
1. Establishes and administers a planning process in anticipation of future needs, problems and issues.	5
2. Participates in the establishment of reasonable goals and objectives for the city and each department	5
3. Achieves specific goals and objectives in a timely manner.	5
4. Assists and coordinates with city council and staff in the implementation of city goals and objectives.	5
Section Average	5

Rate each item in this evaluation based on the following scale.

(1) Poor (2) Fair (3) Good (4) Very Good (5) Excellent

Village Manager Performance Evaluation
Evaluation Period

Staffing	Rate
1. Recruits and retains qualified and highly competent personnel.	4
2. Monitors performance of staff and initiates corrective action as needed to improve job performance.	5
3. Effectively manages employee benefits, compensation, career development, employee relations and union negotiations.	5
4. Evaluates personnel periodically and points out staff weaknesses and strengths.	4
Section Average	4.5

Management Effectiveness	Rate
1. Has the ability to resolve the numerous conflicts inherent in municipal government, is a good negotiator.	5
2. Honest and fair, consistently open and straightforward.	5
3. Responds well to a changing world and local conditions and is adaptive.	5
4. Maintains and shares an appropriate sense of humor to lighten the load.	5
Section Average	5.0

Reporting	Rate
1. Keeps the council well informed with concise written and oral communications.	5
2. Provides meeting backup package in a timely manner.	4
3. Provides sufficient backup information for agendas?	5
4. Prepares a sound agenda, which prevents trivial administrative matters from being reviewed by the council.	4
Section Average	4.5

Rate each item in this evaluation based on the following scale.
(1) Poor (2) Fair (3) Good (4) Very Good (5) Excellent

Village Manager Performance Evaluation
Evaluation Period

Relationship with Council	Rate
1. Willing to meet with council members, both scheduled and unscheduled meetings.	5
2. Carries out the directives of council as a whole rather than those of any one council member, but does recognize the concerns of the minority.	5
3. Does the city manager's office respond completely and in a timely manner to complaints and request from the mayor and city council?	5
4. Assists the council in resolving problems at the administrative level to avoid unnecessary council action.	5
5. Assists the council in establishing policy while acknowledging the ultimate authority of the council.	5
6. Informs the council of administrative developments.	5
7. Informs all council members of important issues and developments.	5
8. Assumes responsibility for staff performance.	5
9. Receptive to constructive criticism and advice.	5
Section Average	5.0

Citizen and Intergovernmental Relations	Rate
1. Handles citizens' questions and complaints in a professional and prompt manner.	5
2. Willing to meet with members of the community and discuss issues of concern.	5
3. Recognizes the public's right and need to be well informed.	5
4. Skillful with the news media, avoiding political position and partisanship.	5
5. Cooperates with the county, state and federal governments.	5
Section Average	5.0

Staff Interaction	Rate
1. Encourages department heads to make decisions within their own jurisdictions without city manager direct approval yet maintains general control of administrative operations.	5
2. Develops a friendly and informal relationship with the work force yet maintains the prestige and dignity of the city manager's office.	5
Section Average	5.0

Rate each item in this evaluation based on the following scale.

(1) Poor (2) Fair (3) Good (4) Very Good (5) Excellent

Village Manager Performance Evaluation
Evaluation Period

Professional Development / Personal Characteristics	Rate
1. Is continuing education to maintain professional development.	5
2. Ethical: conforms to the high standards of the profession; is a member of the ICMA and knows, follows and promotes the "ICMA Code of Ethics"	5
3. Credits municipal accomplishments to the policy makers; does not feed personal ego.	5
4. Job Knowledge: Learns and understands the various skills and procedures of the job.	5
5. Composure, appearance, and attitude fitting for an individual in this executive position.	5
6. Anticipates problems and develops effective approaches for solving them.	5
7. Willing to try new ideas proposed by council or staff.	5
Section Average	5.0

Policy Execution	Rate
1. Accurately interprets the direction given by council.	5
2. Implements council actions in accordance with the intent of council.	5
3. Supports the actions of the city council after a decision is made.	5
4. Enforces city policies.	5
5. Understands the city's laws and ordinances.	5
6. Reviews enforcement procedures periodically to improve effectiveness.	5
7. Offers workable alternatives to the council for changes in the law when an ordinance or policy proves impractical in actual administration.	5
Section Average	5.0

Rate each item in this evaluation based on the following scale.

(1) Poor (2) Fair (3) Good (4) Very Good (5) Excellent

Village Manager Performance Evaluation
Evaluation Period

Fill-ins
1. What are the manager's most significant accomplishments during the past year? a) Starting to build strong staff team. b) Communications with council members c) Building CIP.
2. What are the manager's strongest qualities? Strong negotiating skills Good communicator
3. What areas does the manager need to improve in? Recommendations. Needs better alarm clock.
4. Two things the manager does that you would like him to continue. Communications with council. Leadership on financial issues.
5. Two things the manager does that you would like him to discontinue. Too much time spent on new initiatives. Let's stick to the basics of building a government first.
6. Two things the Manager does not do you would like him to start. Management information systems for Community Development should be in place. Assume negotiations with County.

Rate each item in this evaluation based on the following scale.

(1) Poor (2) Fair (3) Good (4) Very Good (5) Excellent

Village Manager Performance Evaluation
Evaluation Period

								Average
Organizational Management								
Fiscal Management								
Planning								
Staffing								
Management Effectiveness								
Reporting								
Relationship with Council								
Citizen and Intergovernmental Relations								
Staff Interaction								
Professional Development / Personal Characteristics								
Policy Execution								
Overall Average								

Rate each item in this evaluation based on the following scale.
 (1) Poor (2) Fair (3) Good (4) Very Good (5) Excellent
 Page 7 of 7

Estero Village Manager Performance Evaluation

Evaluator
<i>James R. Boesch, Councilperson Dist. 5, Village of Estero</i>
Date
<i>5/14/16</i>

Village Manager Performance Evaluation
Evaluation Period

Organizational Management	Rate
1. Plans and organizes work that implements the policies of city council.	4
2. Initiates and maintains effective professional relationships with department heads.	5
3. Effectively utilizes resources.	5
4. Ability to manage, motivate, train personnel, provide leadership, encourage team atmosphere, manage resources, and set realistic goals and objectives.	4
Section Average	

Fiscal Management	Rate
1. Plans and organizes the preparation of the annual budget using standard financial management procedures and documentation that conforms to the guidelines adopted by city council.	5
2. Administers the adopted budget within approved revenues and expenditures.	5
3. Plans, organizes and supervises the most effective use of manpower, materials, machinery and equipment.	5
4. Makes the best possible use of available funds, conscious of the need to operate the city efficiently and effectively.	5
Section Average	

Planning	Rate
1. Establishes and administers a planning process in anticipation of future needs, problems and issues.	4
2. Participates in the establishment of reasonable goals and objectives for the city and each department	4
3. Achieves specific goals and objectives in a timely manner.	4
4. Assists and coordinates with city council and staff in the implementation of city goals and objectives.	5
Section Average	

Rate each item in this evaluation based on the following scale.
(1) Poor (2) Fair (3) Good (4) Very Good (5) Excellent
Page 2 of 7

Village Manager Performance Evaluation
Evaluation Period

Staffing	Rate
1. Recruits and retains qualified and highly competent personnel.	N/A
2. Monitors performance of staff and initiates corrective action as needed to improve job performance.	4
3. Effectively manages employee benefits, compensation, career development, employee relations and union negotiations.	5
4. Evaluates personnel periodically and points out staff weaknesses and strengths.	5
Section Average	

Management Effectiveness	Rate
1. Has the ability to resolve the numerous conflicts inherent in municipal government, is a good negotiator.	4
2. Honest and fair, consistently open and straightforward.	5
3. Responds well to a changing world and local conditions and is adaptive.	5
4. Maintains and shares an appropriate sense of humor to lighten the load.	5
Section Average	

Reporting	Rate
1. Keeps the council well informed with concise written and oral communications.	5
2. Provides meeting backup package in a timely manner.	4
3. Provides sufficient backup information for agendas?	5
4. Prepares a sound agenda, which prevents trivial administrative matters from being reviewed by the council.	5
Section Average	

Rate each item in this evaluation based on the following scale.

(1) Poor (2) Fair (3) Good (4) Very Good (5) Excellent

Village Manager Performance Evaluation
Evaluation Period

Relationship with Council	Rate
1. Willing to meet with council members, both scheduled and unscheduled meetings.	5
2. Carries out the directives of council as a whole rather than those of any one council member, but does recognize the concerns of the minority.	5
3. Does the city manager's office respond completely and in a timely manner to complaints and request from the mayor and city council?	5
4. Assists the council in resolving problems at the administrative level to avoid unnecessary council action.	4
5. Assists the council in establishing policy while acknowledging the ultimate authority of the council.	5
6. Informs the council of administrative developments.	5
7. Informs all council members of important issues and developments.	4
8. Assumes responsibility for staff performance.	5
9. Receptive to constructive criticism and advice.	5
Section Average	

Citizen and Intergovernmental Relations	Rate
1. Handles citizens' questions and complaints in a professional and prompt manner.	5
2. Willing to meet with members of the community and discuss issues of concern.	5
3. Recognizes the public's right and need to be well informed.	5
4. Skillful with the news media, avoiding political position and partisanship.	N/A
5. Cooperates with the county, state and federal governments.	5
Section Average	

Staff Interaction	Rate
1. Encourages department heads to make decisions within their own jurisdictions without city manager direct approval yet maintains general control of administrative operations.	5
2. Develops a friendly and informal relationship with the work force yet maintains the prestige and dignity of the city manager's office.	5
Section Average	

Rate each item in this evaluation based on the following scale.

(1) Poor (2) Fair (3) Good (4) Very Good (5) Excellent

Village Manager Performance Evaluation
Evaluation Period

Professional Development / Personal Characteristics	Rate
1. Is continuing education to maintain professional development.	4 = UNKNOWN
2. Ethical: conforms to the high standards of the profession; is a member of the ICMA and knows, follows and promotes the "ICMA Code of Ethics"	5
3. Credits municipal accomplishments to the policy makers; does not feed personal ego.	5
4. Job Knowledge: Learns and understands the various skills and procedures of the job.	5
5. Composure, appearance, and attitude fitting for an individual in this executive position.	5
6. Anticipates problems and develops effective approaches for solving them.	4
7. Willing to try new ideas proposed by council or staff.	5
Section Average	

Policy Execution	Rate
1. Accurately interprets the direction given by council.	4
2. Implements council actions in accordance with the intent of council.	5
3. Supports the actions of the city council after a decision is made.	5
4. Enforces city policies.	5
5. Understands the city's laws and ordinances.	5
6. Reviews enforcement procedures periodically to improve effectiveness.	4
7. Offers workable alternatives to the council for changes in the law when an ordinance or policy proves impractical in actual administration.	5
Section Average	

Rate each item in this evaluation based on the following scale.
(1) Poor (2) Fair (3) Good (4) Very Good (5) Excellent
Page 5 of 7

Village Manager Performance Evaluation
 Evaluation Period

Comment: It is very difficult to make poignant, effective evaluations in 6 months for the first time. I would suggest 1 year first year then maybe 6 months after that.

Fill-ins	
1. What are the manager's most significant accomplishments during the past year?	Initiate strong direct negotiations with County Establish a genre of open discussion with developers on Town Center issue
2. What are the manager's strongest qualities?	Reflects a positive attitude Is usually very knowledgeable of facts & figures Has opened a very fair dialogue between developers and village officials
3. What areas does the manager need to improve in? Recommendations.	With his knowledge and ability he should be stronger & recommendations to the Council
4. Two things the manager does that you would like him to continue.	Open door policy to all including Council persons Willingness to discuss situations objectively Continue with future vision in Estero
5. Two things the manager does that you would like him to discontinue.	No thoughts on this yet
6. Two things the Manager does not do you would like him to start.	Streamlining the Council Zoning Meetings to be much shorter Put more council items in one meeting to avoid so many meetings even if it makes meetings longer

Rate each item in this evaluation based on the following scale.

(1) Poor (2) Fair (3) Good (4) Very Good (5) Excellent

Village Manager Performance Evaluation
Evaluation Period

								Average
Organizational Management	5							
Fiscal Management	5							
Planning	5							
Staffing	5							
Management Effectiveness	4							
Reporting	5							
Relationship with Council	4							
Citizen and Intergovernmental Relations	5							
Staff Interaction	5							
Professional Development / Personal Characteristics	5							
Policy Execution	5							
Overall Average								

Rate each item in this evaluation based on the following scale.
 (1) Poor (2) Fair (3) Good (4) Very Good (5) Excellent
 Page 7 of 7

**Estero Village
Manager
Performance
Evaluation**

Evaluator
Katy Errington
Date
May 12, 2016

Village Manager Performance Evaluation
Evaluation Period

Organizational Management	Rate
1. Plans and organizes work that implements the policies of city council.	4
2. Initiates and maintains effective professional relationships with department heads.	4
3. Effectively utilizes resources.	4
4. Ability to manage, motivate, train personnel, provide leadership, encourage team atmosphere, manage resources, and set realistic goals and objectives.	4
Section Average	4

Fiscal Management	Rate
1. Plans and organizes the preparation of the annual budget using standard financial management procedures and documentation that conforms to the guidelines adopted by city council.	5
2. Administers the adopted budget within approved revenues and expenditures.	4
3. Plans, organizes and supervises the most effective use of manpower, materials, machinery and equipment.	4
4. Makes the best possible use of available funds, conscious of the need to operate the city efficiently and effectively.	4
Section Average	4.25

Planning	Rate
1. Establishes and administers a planning process in anticipation of future needs, problems and issues.	5
2. Participates in the establishment of reasonable goals and objectives for the city and each department	4
3. Achieves specific goals and objectives in a timely manner.	4
4. Assists and coordinates with city council and staff in the implementation of city goals and objectives.	4
Section Average	4.25

Rate each item in this evaluation based on the following scale.
(1) Poor (2) Fair (3) Good (4) Very Good (5) Excellent

Village Manager Performance Evaluation
Evaluation Period

Staffing	Rate
1. Recruits and retains qualified and highly competent personnel.	4
2. Monitors performance of staff and initiates corrective action as needed to improve job performance.	5
3. Effectively manages employee benefits, compensation, career development, employee relations and union negotiations.	4
4. Evaluates personnel periodically and points out staff weaknesses and strengths.	4
Section Average	4.25

Management Effectiveness	Rate
1. Has the ability to resolve the numerous conflicts inherent in municipal government, is a good negotiator.	4
2. Honest and fair, consistently open and straightforward.	5
3. Responds well to a changing world and local conditions and is adaptive.	4
4. Maintains and shares an appropriate sense of humor to lighten the load.	5
Section Average	4.50

Reporting	Rate
1. Keeps the council well informed with concise written and oral communications.	4
2. Provides meeting backup package in a timely manner.	4
3. Provides sufficient backup information for agendas?	5
4. Prepares a sound agenda, which prevents trivial administrative matters from being reviewed by the council.	4
Section Average	4.25

Rate each item in this evaluation based on the following scale.
(1) Poor (2) Fair (3) Good (4) Very Good (5) Excellent

Village Manager Performance Evaluation
Evaluation Period

Relationship with Council	Rate
1. Willing to meet with council members, both scheduled and unscheduled meetings.	4
2. Carries out the directives of council as a whole rather than those of any one council member, but does recognize the concerns of the minority.	4
3. Does the city manager's office respond completely and in a timely manner to complaints and request from the mayor and city council?	4
4. Assists the council in resolving problems at the administrative level to avoid unnecessary council action.	4
5. Assists the council in establishing policy while acknowledging the ultimate authority of the council.	4
6. Informs the council of administrative developments.	4
7. Informs all council members of important issues and developments.	4
8. Assumes responsibility for staff performance.	4
9. Receptive to constructive criticism and advice.	4
Section Average	4

Citizen and Intergovernmental Relations	Rate
1. Handles citizens' questions and complaints in a professional and prompt manner.	4
2. Willing to meet with members of the community and discuss issues of concern.	4
3. Recognizes the public's right and need to be well informed.	4
4. Skillful with the news media, avoiding political position and partisanship.	4
5. Cooperates with the county, state and federal governments.	4
Section Average	4

Staff Interaction	Rate
1. Encourages department heads to make decisions within their own jurisdictions without city manager direct approval yet maintains general control of administrative operations.	4
2. Develops a friendly and informal relationship with the work force yet maintains the prestige and dignity of the city manager's office.	5
Section Average	4.5

Rate each item in this evaluation based on the following scale.
(1) Poor (2) Fair (3) Good (4) Very Good (5) Excellent

Village Manager Performance Evaluation
Evaluation Period

Rate each item in this evaluation based on the following scale.
(1) Poor (2) Fair (3) Good (4) Very Good (5) Excellent
Page 5 of 9

Village Manager Performance Evaluation
Evaluation Period

Professional Development / Personal Characteristics	Rate
1. Is continuing education to maintain professional development.	5
2. Ethical: conforms to the high standards of the profession; is a member of the ICMA and knows, follows and promotes the "ICMA Code of Ethics"	5
3. Credits municipal accomplishments to the policy makers; does not feed personal ego.	5
4. Job Knowledge: Learns and understands the various skills and procedures of the job.	4
5. Composure, appearance, and attitude fitting for an individual in this executive position.	5
6. Anticipates problems and develops effective approaches for solving them.	4
7. Willing to try new ideas proposed by council or staff.	4
Section Average	4.57

Policy Execution	Rate
1. Accurately interprets the direction given by council.	4
2. Implements council actions in accordance with the intent of council.	5
3. Supports the actions of the city council after a decision is made.	5
4. Enforces city policies.	5
5. Understands the city's laws and ordinances.	4
6. Reviews enforcement procedures periodically to improve effectiveness.	4
7. Offers workable alternatives to the council for changes in the law when an ordinance or policy proves impractical in actual administration.	4
Section Average	4.43

Rate each item in this evaluation based on the following scale.
(1) Poor (2) Fair (3) Good (4) Very Good (5) Excellent
Page 6 of 9

Village Manager Performance Evaluation
Evaluation Period

Fill-ins
<p>1. What are the manager's most significant accomplishments during the past year?</p> <p>Beginning a new job with an unknown village council and working with staff that he did not hire. Another significant accomplishment has been diving head first into the Florida Sunshine Laws and learning about Estero.</p>
<p>2. What are the manager's strongest qualities?</p> <p>His professionalism and knowledge in dealing with staff, council, contractors, developers, community, news media, etc.</p>
<p>3. What areas does the manager need to improve in? Recommendations.</p> <p>Steve is under much stress with learning a new managerial job that is government-lite and with not much staff to assist. He needs an assistant village manager and in addition an administrative assistant at the front desk.</p>
<p>4. Two things the manager does that you would like him to continue.</p> <ol style="list-style-type: none">1. Invite each council member for a briefing before any meetings that have the potential of much discussion.2. Continue to discuss with each council member our visions and how they could be Implemented in Estero.
<p>5. Two things the manager does that you would like him to discontinue.</p> <ol style="list-style-type: none">1. Stop trying to read everything on the cell phone that would be much easier on a personal laptop. Acquire an Apple PC like the councilors have.2. Stop interrupting personal meetings by looking at who is calling on the cell phone. Give the individual meeting with him, his undivided attention.
<p>6. Two things the Manager does not do you would like him to start.</p> <ol style="list-style-type: none">1. Don't over commit to the point that you don't commit at all.2. When I contact him via text, email, phone call, or voice mail about something that I believe is important, I would like a response within an hour or two hours that he did receive a message from me and that he will get back with me.

Rate each item in this evaluation based on the following scale.

(1) Poor (2) Fair (3) Good (4) Very Good (5) Excellent

Village Manager Performance Evaluation
Evaluation Period

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									Average
Organizational Management									4.00
Fiscal Management									4.25
Planning									4.25
Staffing									4.25
Management Effectiveness									4.50
Reporting									4.25
Relationship with Council									4.00
Citizen and Intergovernmental Relations									4.00
Staff Interaction									4.50
Professional Development / Personal Characteristics									4.57

Rate each item in this evaluation based on the following scale.
 (1) Poor (2) Fair (3) Good (4) Very Good (5) Excellent
 Page 8 of 9

Village Manager Performance Evaluation
Evaluation Period

Policy Execution								4.43
<i>Overall Average</i>								4.27

Rate each item in this evaluation based on the following scale.
(1) Poor (2) Fair (3) Good (4) Very Good (5) Excellent
Page 9 of 9



Estero Village Manager Performance Evaluation

Evaluator
Donald Brown
Date
5/15/16

Village Manager Performance Evaluation
Evaluation Period

Organizational Management	Rate
1. Plans and organizes work that implements the policies of city council.	5
2. Initiates and maintains effective professional relationships with department heads.	4
3. Effectively utilizes resources.	4
4. Ability to manage, motivate, train personnel, provide leadership, encourage team atmosphere, manage resources, and set realistic goals and objectives.	3
Section Average	4

Fiscal Management	Rate
1. Plans and organizes the preparation of the annual budget using standard financial management procedures and documentation that conforms to the guidelines adopted by city council.	4
2. Administers the adopted budget within approved revenues and expenditures.	5
3. Plans, organizes and supervises the most effective use of manpower, materials, machinery and equipment.	4
4. Makes the best possible use of available funds, conscious of the need to operate the city efficiently and effectively.	5
Section Average	4.4

Planning	Rate
1. Establishes and administers a planning process in anticipation of future needs, problems and issues.	4
2. Participates in the establishment of reasonable goals and objectives for the city and each department	4
3. Achieves specific goals and objectives in a timely manner.	4
4. Assists and coordinates with city council and staff in the implementation of city goals and objectives.	5
Section Average	4.25

Rate each item in this evaluation based on the following scale.
(1) Poor (2) Fair (3) Good (4) Very Good (5) Excellent

Village Manager Performance Evaluation
Evaluation Period

Staffing	Rate
1. Recruits and retains qualified and highly competent personnel.	5
2. Monitors performance of staff and initiates corrective action as needed to improve job performance.	4
3. Effectively manages employee benefits, compensation, career development, employee relations and union negotiations.	3
4. Evaluates personnel periodically and points out staff weaknesses and strengths.	4
Section Average	4

Management Effectiveness	Rate
1. Has the ability to resolve the numerous conflicts inherent in municipal government, is a good negotiator.	4
2. Honest and fair, consistently open and straightforward.	5
3. Responds well to a changing world and local conditions and is adaptive.	5
4. Maintains and shares an appropriate sense of humor to lighten the load.	3
Section Average	4.25

Reporting	Rate
1. Keeps the council well informed with concise written and oral communications.	5
2. Provides meeting backup package in a timely manner.	4
3. Provides sufficient backup information for agendas?	4
4. Prepares a sound agenda, which prevents trivial administrative matters from being reviewed by the council.	5
Section Average	4.5

Rate each item in this evaluation based on the following scale.
(1) Poor (2) Fair (3) Good (4) Very Good (5) Excellent

Village Manager Performance Evaluation
Evaluation Period

Relationship with Council	Rate
1. Willing to meet with council members, both scheduled and unscheduled meetings.	5
2. Carries out the directives of council as a whole rather than those of any one council member, but does recognize the concerns of the minority.	5
3. Does the city manager's office respond completely and in a timely manner to complaints and request from the mayor and city council?	5
4. Assists the council in resolving problems at the administrative level to avoid unnecessary council action.	4
5. Assists the council in establishing policy while acknowledging the ultimate authority of the council.	5
6. Informs the council of administrative developments.	4
7. Informs all council members of important issues and developments.	4
8. Assumes responsibility for staff performance.	4
9. Receptive to constructive criticism and advice.	5
Section Average	4.6

Citizen and Intergovernmental Relations	Rate
1. Handles citizens' questions and complaints in a professional and prompt manner.	5
2. Willing to meet with members of the community and discuss issues of concern.	5
3. Recognizes the public's right and need to be well informed.	5
4. Skillful with the news media, avoiding political position and partisanship.	4
5. Cooperates with the county, state and federal governments.	5
Section Average	4.8

Staff Interaction	Rate
1. Encourages department heads to make decisions within their own jurisdictions without city manager direct approval yet maintains general control of administrative operations.	4
2. Develops a friendly and informal relationship with the work force yet maintains the prestige and dignity of the city manager's office.	5
Section Average	4.5

Rate each item in this evaluation based on the following scale.

(1) Poor (2) Fair (3) Good (4) Very Good (5) Excellent

Village Manager Performance Evaluation
Evaluation Period

Professional Development / Personal Characteristics	Rate
1. Is continuing education to maintain professional development.	5
2. Ethical: conforms to the high standards of the profession; is a member of the ICMA and knows, follows and promotes the "ICMA Code of Ethics"	5
3. Credits municipal accomplishments to the policy makers; does not feed personal ego.	5
4. Job Knowledge: Learns and understands the various skills and procedures of the job.	5
5. Composure, appearance, and attitude fitting for an individual in this executive position.	5
6. Anticipates problems and develops effective approaches for solving them.	5
7. Willing to try new ideas proposed by council or staff.	5
Section Average	5

Policy Execution	Rate
1. Accurately interprets the direction given by council.	5
2. Implements council actions in accordance with the intent of council.	4
3. Supports the actions of the city council after a decision is made.	5
4. Enforces city policies.	5
5. Understands the city's laws and ordinances.	5
6. Reviews enforcement procedures periodically to improve effectiveness.	5
7. Offers workable alternatives to the council for changes in the law when an ordinance or policy proves impractical in actual administration.	5
Section Average	4.8

Rate each item in this evaluation based on the following scale.
(1) Poor (2) Fair (3) Good (4) Very Good (5) Excellent
Page 5 of 7

Village Manager Performance Evaluation
Evaluation Period

Fill-ins

1. What are the manager's most significant accomplishments during the past year?

Burt

Frankly this entire evaluation is really subjective.

Through no fault of his, I unfortunately have not had as much contact and working relationship as the other council members. The past year have not been without there challenges and not sure that this evaluation is fair or accurate evaluation of his performance.

You do not want to use this I completely understand why you would not want to use the evaluation.

Donald

2. What areas does the manager need to improve in? Recommendations.

3. Two things the manager does that you would like him to continue.

4. Two things the manager does that you would like him to discontinue.

5. Two things the Manager does not do you would like him to start.

Rate each item in this evaluation based on the following scale.

(1) Poor (2) Fair (3) Good (4) Very Good (5) Excellent

Village Manager Performance Evaluation
Evaluation Period

								Average
Organizational Management								4
Fiscal Management								4.4
Planning								4.25
Staffing								4
Management Effectiveness								4.25
Reporting								4.5
Relationship with Council								4.6
Citizen and Intergovernmental Relations								4.
Staff Interaction								4.5
Professional Development / Personal Characteristics								5
Policy Execution								4.8
Overall Average								4.39

Rate each item in this evaluation based on the following scale.
(1) Poor (2) Fair (3) Good (4) Very Good (5) Excellent
Page 7 of 7

Estero Village Manager Performance Evaluation

Evaluator
Bill Ribble Evaluation The Estero Village Manager, Steve Sarkozy
Date
May 13, 2016

Village Manager Performance Evaluation
Evaluation Period

Organizational Management	Rate
1. Plans and organizes work that implements the policies of city council.	5
2. Initiates and maintains effective professional relationships with department heads.	5
3. Effectively utilizes resources.	5
4. Ability to manage, motivate, train personnel, provide leadership, encourage team atmosphere, manage resources, and set realistic goals and objectives.	5
Section Average	5

Fiscal Management	Rate
1. Plans and organizes the preparation of the annual budget using standard financial management procedures and documentation that conforms to the guidelines adopted by city council.	5
2. Administers the adopted budget within approved revenues and expenditures.	5
3. Plans, organizes and supervises the most effective use of manpower, materials, machinery and equipment.	N/A
4. Makes the best possible use of available funds, conscious of the need to operate the city efficiently and effectively.	5
Section Average	5

Planning	Rate
1. Establishes and administers a planning process in anticipation of future needs, problems and issues.	5
2. Participates in the establishment of reasonable goals and objectives for the city and each department	5
3. Achieves specific goals and objectives in a timely manner.	5
4. Assists and coordinates with city council and staff in the implementation of city goals and objectives.	5
Section Average	5

Rate each item in this evaluation based on the following scale.

(1) Poor (2) Fair (3) Good (4) Very Good (5) Excellent

Village Manager Performance Evaluation
Evaluation Period

Staffing	Rate
1. Recruits and retains qualified and highly competent personnel.	5
2. Monitors performance of staff and initiates corrective action as needed to improve job performance.	5
3. Effectively manages employee benefits, compensation, career development, employee relations and union negotiations.	5
4. Evaluates personnel periodically and points out staff weaknesses and strengths.	5
Section Average	5

Management Effectiveness	Rate
1. Has the ability to resolve the numerous conflicts inherent in municipal government, is a good negotiator.	5
2. Honest and fair, consistently open and straightforward.	5
3. Responds well to a changing world and local conditions and is adaptive.	5
4. Maintains and shares an appropriate sense of humor to lighten the load.	5
Section Average	5

Reporting	Rate
1. Keeps the council well informed with concise written and oral communications.	5
2. Provides meeting backup package in a timely manner.	5
3. Provides sufficient backup information for agendas?	5
4. Prepares a sound agenda, which prevents trivial administrative matters from being reviewed by the council.	5
Section Average	5

Rate each item in this evaluation based on the following scale.
(1) Poor (2) Fair (3) Good (4) Very Good (5) Excellent
Page 3 of 7

Village Manager Performance Evaluation
Evaluation Period

Relationship with Council	Rate
1. Willing to meet with council members, both scheduled and unscheduled meetings.	5
2. Carries out the directives of council as a whole rather than those of any one council member, but does recognize the concerns of the minority.	5
3. Does the city manager's office respond completely and in a timely manner to complaints and request from the mayor and city council?	5
4. Assists the council in resolving problems at the administrative level to avoid unnecessary council action.	5
5. Assists the council in establishing policy while acknowledging the ultimate authority of the council.	5
6. Informs the council of administrative developments.	5
7. Informs all council members of important issues and developments.	5
8. Assumes responsibility for staff performance.	5
9. Receptive to constructive criticism and advice.	5
Section Average	5

Citizen and Intergovernmental Relations	Rate
1. Handles citizens' questions and complaints in a professional and prompt manner.	5
2. Willing to meet with members of the community and discuss issues of concern.	5
3. Recognizes the public's right and need to be well informed.	5
4. Skillful with the news media, avoiding political position and partisanship.	5
5. Cooperates with the county, state and federal governments.	5
Section Average	5

Staff Interaction	Rate
1. Encourages department heads to make decisions within their own jurisdictions without city manager direct approval yet maintains general control of administrative operations.	5
2. Develops a friendly and informal relationship with the work force yet maintains the prestige and dignity of the city manager's office.	5
Section Average	5

Rate each item in this evaluation based on the following scale.
(1) Poor (2) Fair (3) Good (4) Very Good (5) Excellent

Village Manager Performance Evaluation
Evaluation Period

Professional Development / Personal Characteristics	Rate
1. Is continuing education to maintain professional development.	5
2. Ethical: conforms to the high standards of the profession; is a member of the ICMA and knows, follows and promotes the "ICMA Code of Ethics"	5
3. Credits municipal accomplishments to the policy makers; does not feed personal ego.	5
4. Job Knowledge: Learns and understands the various skills and procedures of the job.	5
5. Composure, appearance, and attitude fitting for an individual in this executive position.	5
6. Anticipates problems and develops effective approaches for solving them.	5
7. Willing to try new ideas proposed by council or staff.	5
Section Average	5

Policy Execution	Rate
1. Accurately interprets the direction given by council.	5
2. Implements council actions in accordance with the intent of council.	5
3. Supports the actions of the city council after a decision is made.	5
4. Enforces city policies.	5
5. Understands the city's laws and ordinances.	5
6. Reviews enforcement procedures periodically to improve effectiveness.	5
7. Offers workable alternatives to the council for changes in the law when an ordinance or policy proves impractical in actual administration.	5
Section Average	5

Rate each item in this evaluation based on the following scale.
(1) Poor (2) Fair (3) Good (4) Very Good (5) Excellent
Page 5 of 7

Village Manager Performance Evaluation
Evaluation Period

Fill-ins
<p>1. What are the manager's most significant accomplishments during the past year?</p> <p>Steve has done an excellent job in helping our Land Management Director, Mary Gibbs setting up and organizing her Land Management Department. Steve has also done an excellent job in bringing the staff and council together in a collaborative way.</p>
<p>2. What are the manager's strongest qualities?</p> <p>Steve Sarkozy has almost 39 years of experience in the managing of municipalities. His years of experience in being a visionary, strategic thinker, innovator and team builder, have been demonstrated in his ability to bring the staff and council together on the various issues in our community.</p>
<p>3. What areas does the manager need to improve in? Recommendations.</p> <p>For having only six months of experience as Estero Village Manager, Steve demonstrates his ability to grow as he learns about the community and identifies with local internal and external politics. His years of experience continue to benefit the Village of Estero.</p>
<p>4. Two things the manager does that you would like him to continue.</p> <p>As Village Manager, Steve does an excellent job in his scheduling of "one on one" meetings with each council member. This continues to enhance his collaborative skills, builds alliances and consensus. Steve also has weekly meetings with his staff where he coaches, mentors, guides and recognizes staff for their achievements.</p>
<p>5. Two things the manager does that you would like him to discontinue.</p> <p>Steve has demonstrated to me that his management and organizational style are one that will benefit the Village of Estero. We all can learn from Mr. Sarkozy.</p>
<p>6. Two things the Manager does not do you would like him to start.</p> <p>With all the tasks that Mr. Sarkozy has on his plate in the building of our village, I see no benefit in giving him "busy things" to do that won't add value to his daily vision and achievements.</p>

Village Manager Performance Evaluation
Evaluation Period

								Average
Organizational Management								5
Fiscal Management								5
Planning								5
Staffing								5
Management Effectiveness								5
Reporting								5
Relationship with Council								5
Citizen and Intergovernmental Relations								5
Staff Interaction								5
Professional Development / Personal Characteristics								5
Policy Execution								5
Overall Average								5

Rate each item in this evaluation based on the following scale.
(1) Poor (2) Fair (3) Good (4) Very Good (5) Excellent
Page 7 of 7

Estero Village Manager Performance Evaluation

Evaluator
JIM WILSON
Date
5-12-2016

Village Manager Performance Evaluation
Evaluation Period

Organizational Management	Rate
1. Plans and organizes work that implements the policies of city council.	5
2. Initiates and maintains effective professional relationships with department heads.	5
3. Effectively utilizes resources.	5
4. Ability to manage, motivate, train personnel, provide leadership, encourage team atmosphere, manage resources, and set realistic goals and objectives.	5
Section Average	5

Fiscal Management	Rate
1. Plans and organizes the preparation of the annual budget using standard financial management procedures and documentation that conforms to the guidelines adopted by city council.	5
2. Administers the adopted budget within approved revenues and expenditures.	N/A
3. Plans, organizes and supervises the most effective use of manpower, materials, machinery and equipment.	5
4. Makes the best possible use of available funds, conscious of the need to operate the city efficiently and effectively.	5
Section Average	5

LISA

Planning	Rate
1. Establishes and administers a planning process in anticipation of future needs, problems and issues.	5
2. Participates in the establishment of reasonable goals and objectives for the city and each department	5
3. Achieves specific goals and objectives in a timely manner.	5
4. Assists and coordinates with city council and staff in the implementation of city goals and objectives.	5
Section Average	5

Rate each item in this evaluation based on the following scale.
(1) Poor (2) Fair (3) Good (4) Very Good (5) Excellent
Page 2 of 7

Village Manager Performance Evaluation
Evaluation Period

Staffing	Rate
1. Recruits and <u>retains</u> qualified and highly competent personnel.	NA
2. Monitors performance of staff and initiates corrective action as needed to improve job performance.	5
3. Effectively manages employee benefits, compensation, career development, employee relations and union negotiations.	NA
4. Evaluates personnel periodically and points out staff weaknesses and strengths.	5
Section Average	5

Management Effectiveness	Rate
1. Has the ability to resolve the numerous conflicts inherent in municipal government, is a good negotiator.	5
2. Honest and fair, consistently open and straightforward.	5
3. Responds well to a changing world and local conditions and is adaptive.	5
4. Maintains and shares an appropriate sense of humor to lighten the load.	4
Section Average	4.75

Reporting	Rate
1. Keeps the council well informed with concise written and oral communications.	5
2. Provides meeting backup package in a timely manner.	3
3. Provides sufficient backup information for agendas?	4
4. Prepares a sound agenda, which prevents trivial administrative matters from being reviewed by the council.	5
Section Average	4.25

Rate each item in this evaluation based on the following scale.
(1) Poor (2) Fair (3) Good (4) Very Good (5) Excellent
Page 3 of 7

Village Manager Performance Evaluation
Evaluation Period

Relationship with Council	Rate
1. Willing to meet with council members, both scheduled and unscheduled meetings.	5
2. Carries out the directives of council as a whole rather than those of any one council member, but does recognize the concerns of the minority.	5
3. Does the city manager's office respond completely and in a timely manner to complaints and request from the mayor and city council?	5
4. Assists the council in resolving problems at the administrative level to avoid unnecessary council action.	5
5. Assists the council in establishing policy while acknowledging the ultimate authority of the council.	5
6. Informs the council of administrative developments.	5
7. Informs all council members of important issues and developments.	5
8. Assumes responsibility for staff performance.	5
9. Receptive to constructive criticism and advice.	5
Section Average	5

Citizen and Intergovernmental Relations	Rate
1. Handles citizens' questions and complaints in a professional and prompt manner.	N/A
2. Willing to meet with members of the community and discuss issues of concern.	5
3. Recognizes the public's right and need to be well informed.	4.5
4. Skillful with the news media, avoiding political position and partisanship.	5
5. Cooperates with the county, state and federal governments.	5
Section Average	4.9

Staff Interaction	Rate
1. Encourages department heads to make decisions within their own jurisdictions without city manager direct approval yet maintains general control of administrative operations.	5
2. Develops a friendly and informal relationship with the work force yet maintains the prestige and dignity of the city manager's office.	5
Section Average	5

Rate each item in this evaluation based on the following scale.
(1) Poor (2) Fair (3) Good (4) Very Good (5) Excellent
Page 4 of 7

Village Manager Performance Evaluation
Evaluation Period

Professional Development / Personal Characteristics	Rate
1. Is continuing education to maintain professional development.	5
2. Ethical: conforms to the high standards of the profession; is a member of the ICMA and knows, follows and promotes the "ICMA Code of Ethics"	5
3. Credits municipal accomplishments to the policy makers; does not feed personal ego.	5
4. Job Knowledge: Learns and understands the various skills and procedures of the job.	5
5. Composure, appearance, and attitude fitting for an individual in this executive position.	5
6. Anticipates problems and develops effective approaches for solving them.	5
7. Willing to try new ideas proposed by council or staff.	5
Section Average	5

Policy Execution	Rate
1. Accurately interprets the direction given by council.	5
2. Implements council actions in accordance with the intent of council.	5
3. Supports the actions of the city council after a decision is made.	5
4. Enforces city policies.	5
5. Understands the city's laws and ordinances.	5
6. Reviews enforcement procedures periodically to improve effectiveness.	5
7. Offers workable alternatives to the council for changes in the law when an ordinance or policy proves impractical in actual administration.	5
Section Average	5

Rate each item in this evaluation based on the following scale.
(1) Poor (2) Fair (3) Good (4) Very Good (5) Excellent
Page 5 of 7

Village Manager Performance Evaluation
Evaluation Period

Fill-ins

1. What are the manager's most significant accomplishments during the past year?

HANDLING LOADS OF ISSUES - RESOLVING
MANY AND TASKING EFFECTIVELY THE ONGOING
ONES.

2. What are the manager's strongest qualities? ABILITY TO HANDLE
MANY TASKS IN NEW VILLAGE

STRONG EXPERIENCE IN MUNICIPAL MANAGEMENT

3. What areas does the manager need to improve in? Recommendations.

SOMETIMES MAY NEED TO SAY NO TO ACCEPTING
LOW PRIORITY TASKS.

4. Two things the manager does that you would like him to continue.

BRIEFINGS TO ALL COUNCIL MEMBERS
ON PERIODIC BASIS

GOOD COMMUNICATION WITH MANAGEMENT TEAM

5. Two things the manager does that you would like him to discontinue.

CAN'T THINK OF ANYTHING

6. Two things the Manager does not do you would like him to start.

HIRE ASSISTANT MANAGER THAT IS BUDGETED.

Rate each item in this evaluation based on the following scale.

(1) Poor (2) Fair (3) Good (4) Very Good (5) Excellent

Village Manager Performance Evaluation
Evaluation Period

	JN							Average
Organizational Management	5							
Fiscal Management	5							
Planning	5							
Staffing	5							
Management Effectiveness	4.75							
Reporting	4.25							
Relationship with Council	5							
Citizen and Intergovernmental Relations	4.9							
Staff Interaction	5							
Professional Development / Personal Characteristics	5							
Policy Execution	5							
Overall Average	4.9							

Rate each item in this evaluation based on the following scale.
 (1) Poor (2) Fair (3) Good (4) Very Good (5) Excellent
 Page 7 of 7