

Proposed Chapel Hill Town Manager Evaluation Process

<u>Key Dates</u>	<u>Activity</u>
TBD	Manager submits to Mayor and Council key performance highlights and accomplishments.
TBD	Mayor and Council complete evaluation form (criteria below; evaluation conducted through preferred survey platform).
TBD	Mayor and Council, with Facilitator, conduct performance review with Manager. Determine performance rating, key goals for next rating period, and report overall rating and any compensation adjustments to Manager (Closed Session).

Evaluation Purpose and Criteria

Evaluation Purpose:

The purpose of evaluating Town Manager _____ is to review performance over the past year. It is an opportunity to gain a better understanding of, and greater appreciation for, the expectations of both the Town Council and the Town Manager. It also serves as a forum to mutually discuss the Board-Manager relationship, to set realistic goals and objectives for the future, and to create the atmosphere of teamwork. While this is a one-year evaluation, reviewing performance from _____ to _____, individual Council members are encouraged to communicate frequently with and provide feedback throughout the year to the Manager.

There are no perfect evaluation tools or “one best way” process. However, the intent is for the evaluation to be a thoughtful, effective, sensitive, and constructive undertaking.

Evaluation Criteria:

This form presents 10 categories of evaluation criteria. Each category contains a number of statements to describe a behavior standard in that category, which will be averaged to determine an overall rating for each category. For each statement, the following scale should be used to indicate a rating for the Manager’s performance. This form also contains a provision for entering narrative comments, including specific questions, and any observations you believe are appropriate and pertinent to the rating period.

3 = Exceeds Expectations (almost always exceeds the performance standard)

2 = Meets Expectations (generally meets the performance standard)

1 = Needs Improvement (usually does not meet the performance standard)

Please answer all questions. If you are unable to rate the Manager on a question, leave the space blank, and the item will not be included in the average score for that Performance Category.

Each member of the Town Council should initial each page, sign the form, and forward the completed evaluations to _____. The deadline for submitting this performance evaluation is _____.

Performance Category Scoring

1. Personal Qualities, Leadership, and Professionalism

_____ Exercises good judgment and is skillful in defining situations and determining the appropriate time to act

_____ Self-starter, and possesses the necessary mental and physical stamina

_____ Exhibits composure, appearance, and attitude appropriate for executive position

_____ Demonstrates fairness, honesty, impartiality, and ethical and legal awareness in personal and professional relationships and conformance to the ICMA Code of Ethics

_____ Exhibits a commitment to continuing education in order to further professional development

2. Vision, Creativity, Agility, and Innovation

_____ Sets an example that moves the organization and community toward innovation, change, creative problem-solving, and prompt action

_____ Demonstrates a personal orientation toward action and accepts responsibility for results

_____ Resists the status quo and removes stumbling blocks that delay progress toward goals and objectives

_____ Develops new ideas or practices and applies existing ideas and practices to new situations

3. Relations with Elected Members of the Town Council

_____ Carries out directives of the Council as a whole, rather than those of any one member, but recognizes the concerns of the minority

_____ Disseminates information equally and fully to Council members

_____ Informs the Council of current and emerging issues and administrative developments in a timely manner

2 Initials _____

_____ Sets meeting agendas that reflect the guidance and priorities of the Council and avoid unnecessary involvement in administrative actions

_____ Resolves problems at the administrative level in a manner that avoids unnecessary Council action

_____ Receptive to constructive criticism and advice

4. Policy Facilitation and Execution

_____ Assists the Council in making well thought out policy through providing information and advice

_____ Understands and enforces local laws, ordinances, and policies

_____ Knowledgeable of current developments affecting local government management

_____ Implements Council actions fairly and consistently in accordance with Council's intent and applicable laws and regulations

_____ Offers workable alternatives for changes in law or policy that are legal and ethical when existing policy is no longer practical

_____ Supports Council actions after a decision has been reached, both inside and outside the organization

5. Communications and Reporting

_____ Reports and regular information are accurate, comprehensive, concise, and written to their intended audience

_____ Responds in a timely manner to requests from Council members for special reports

_____ Reports are generally produced through Manager's own initiative rather than when requested by members

_____ Produces and handles reports in a way to convey the message that affairs of the organization are fully open to public scrutiny

6. Budgeting and Financial Management

_____ Prepares a balanced, strategic budget that provides services at a level desired by Council

_____ Makes the best possible uses of available funds, conscious of the need to operate the local government efficiently, effectively, and equitably.

_____ Prepares a budget and budgetary recommendations in a comprehensive, intelligent, and accessible format

_____ Monitors and manages fiscal activities of the organization appropriately

_____ Interprets financial information to ensure the short- and long-term financial sustainability, cost-effectiveness, and strength of local operations and infrastructure investments

7. Community Relations and Engagement

- _____ Treats community members with respect
- _____ Demonstrates a dedication to service to the community and its residents
- _____ Easily approachable, meets with and listens to community members to discuss their concerns, and strives to understand their interests
- _____ Makes an appropriate effort to maintain resident satisfaction with local services
- _____ Difficult issues facing the local government are addressed, and steps are taken to avoid unnecessary controversy in the community

8. Intergovernmental, University, and Association Relations

- _____ Collaborates with other governmental units in the region with which the Town does business, including areawide and special purpose units
- _____ Collaborates with state and federal government agencies and identifies opportunities for grant funding
- _____ Collaborates with University of North Carolina at Chapel Hill officials
- _____ Actively participates in professional associations

9. Staff Effectiveness

- _____ Recruits and retains qualified and highly competent personnel for senior staff positions
- _____ Applies an appropriate level of supervision to be aware of and improve any areas of substandard performance
- _____ Ensures that the Town's personnel policies and practices are administered equitably by Department Directors
- _____ Ensures the compensation and benefits plans and the merit system are managed effectively
- _____ Supports employee professional growth, development, and accomplishment at all levels of the organization
- _____ Works as a team leader and seeks ways to be innovative toward effective problem-solving
- _____ Manages and evaluates senior personnel primarily by setting performance goals and objectives, assessing progress at least annually, and providing feedback
- _____ Encourages Department Directors to make decisions within their own jurisdictions without the Manager's approval, yet maintains general control of operations
- _____ Instills confidence in subordinates, encourages taking initiative, and emphasizes supportive rather than restrictive controls for their programs

10. Strategic Priorities

- _____ Effectively advances implementation of Council Strategic Priority #1

_____ Effectively advances implementation of Council Strategic Priority #2

_____ Effectively advances implementation of Council Strategic Priority #3

_____ Effectively advances implementation of Council Strategic Priority #4

Scoring

Total score from the values assigned to statements in Performance Categories 1-10:

Total# = _____ divided by XX (the actual # of questions answered) = _____ average

Strongest category of groups above (by average score): _____

Weakest category of groups above (by average score): _____

Narrative Evaluation

11. What would you identify as the Manager's strengths, expressed in terms of the principal results achieved during the rating period?

12. What performance areas would you identify as most critical for improvement in the next year?

13. What constructive, positive suggestions or assistance can you offer the Manager to enhance performance?

14. What other comments do you have for the Manager (e.g. priorities, expectations, goals or specific objectives) for the new rating period?

5 Initials _____

Evaluator's Signature: _____

Date: _____

6 Initials _____