

Evaluation Process for Appointed Positions

BUDGET, GOVERNANCE AND INTERGOVERNMENTAL RELATIONS
COMMITTEE

MAY 1, 2023

POLICY QUESTION AND COMMITTEE CHARGE

How can Council staff appointees' performance be evaluated most effectively?

- ▶ Assess and make recommendations specific to how to effectively evaluate City Council staff appointee's performance.
- ▶ Report to full Council on suggestions and recommendations.

HR ASSIGNMENTS

FROM THE PRIOR COMMITTEE MEETING ON APRIL 3, 2023

► Benchmark 360 Assessment Practices

- Survey cities and counties across the state and the nation to determine how or if 360 assessments are included in performance evaluations for appointed positions.

► Performance Conversation Framework Template

- Create a performance conversation framework for each appointed position to display the alignment of their objectives to Council's defined strategic priorities and initiatives.

Performance Evaluation Survey

BENCHMARK RESULTS

80% Include Competency Performance Objectives

50% Have measurable goals

1 Uses an external consultant to facilitate Appointee evaluation process

0% Uses a 360 Assessment in their performance evaluation process

Performance Evaluation Conversation Framework Template

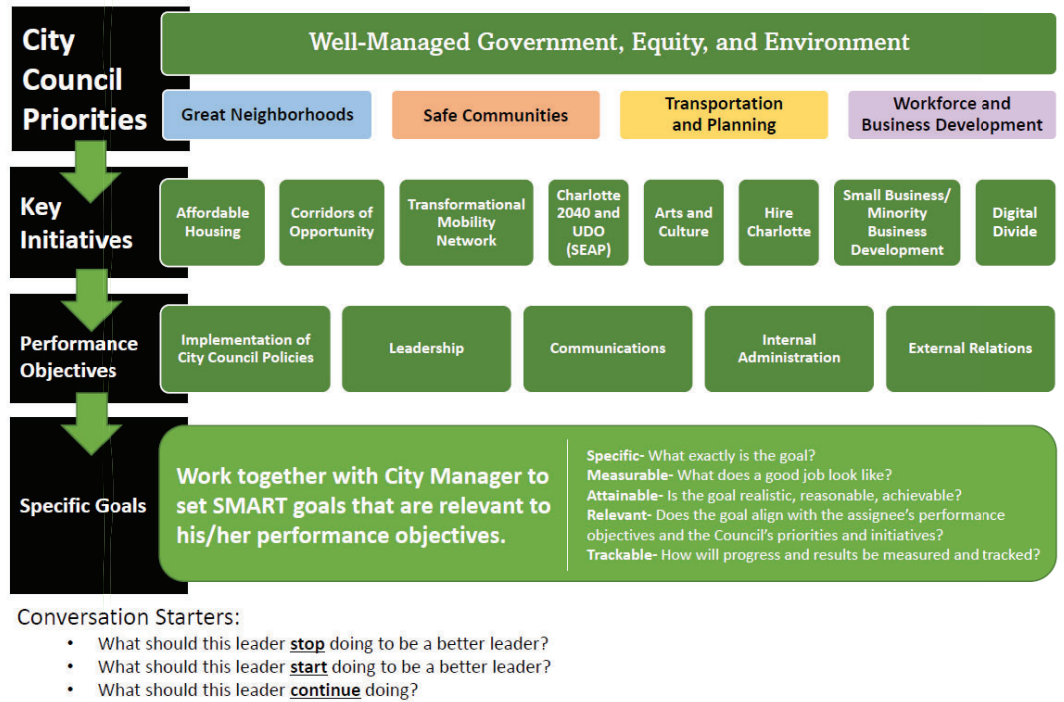
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Purpose:

- 1 Facilitate meaningful performance conversations with your appointee throughout the year.
- 2 Jointly set SMART goals with appointee
- 3 Ensure those goals align with:
 - City Council Strategic Priorities
 - City Council Key Initiatives
 - Appointee's Fiscal Year Performance Objectives

City Manager Performance Evaluation Conversation Framework

Talking Point Suggestions: During the one-on-one meetings, share with the appointee questions, concerns, or compliments you have about their leadership, their department operations, finances, budgets or general questions about city culture that you would like to address.



Performance Evaluation Conversation Framework Template

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Purpose:

- 1 Convenient reference of objective details specific to your appointee.
- 2 Ensures "no surprises" for either party.

City Manager Performance Objectives Details

Implementation of City Council Policies

- Assist City Council in policymaking.
- Assist City Council to establish strategic priorities and initiatives
- Assist City Council to set short-term, mid-term, and long-term performance organizational performance objectives and goals.
- Proactively provide timely information, solution-oriented advice, and recommendations to Mayor and City Council members on matters that are time sensitive and/or matters that require immediate attention.
- Routinely provide inform Council regarding community or internal operations that reach beyond general administrative in nature.

Leadership (Communication, Effective City Leadership, Exhibit a balance of directive and collaborative management Style)

- Strategic and forward thinker
- Sets a vision, creates a sense of common purpose and direction
- Anticipate change and looks for opportunities to prepare for and invest in the future.
- Inspire others to achieve and contribute at the highest levels of public service
- Embrace a spirit of excellence, accountability, and customer service

Communications

- Respond in a timely manner to requests from Mayor and City Council members
- Demonstrate effective oral communications and listening skills and embrace diverse opinions
- Provide regular information and updates to Mayor and City Council concerning important city initiatives.
- Effectively build rapport with groups and individuals of diverse perspectives and opinions
- Demonstrate the ability to be decisive and an effective mediator and negotiator

Internal Administration (Financial Management and Human Capital Management)

- Prepare a balanced budget to provide services aligned with Mayor and City Council priorities
- Demonstrate a strong financial performance and maintain a high performing credit rating of the Annual Comprehensive Financial Report
- Implement, City Council Priorities.
- Monitor, and measure organizational performance against the Council priorities.
- Recruit and retain competent personnel for leadership positions
- Sets performance objectives for leaders that align with Council priorities and hold them accountable to meet the associated expressed intent of council objectives.

External Relations (Community, Residents, Businesses, and Intergovernmental Relations)

- Develop partnerships and demonstrates dedication to local businesses and community groups
- Support the actions of the governing body after a decision has been reached, both inside and outside the organization
- Meet with, and listen to, members of the community to discuss their concerns and strive to understand their interests
- Cooperate with regional, state, and federal government agencies and legislators to influence legislative efforts consistent with the City Council's interests and needs



Appointee Performance Objectives



City Manager

- **Implementation of City Council Policies**
 - Assist w/ Policy-making
 - Assist w/Strategic priorities and initiatives
- **Leadership**
 - Communication
 - Effective City Leadership
 - Exhibit a balance of directive and collaborative management styles
- **Communications**
 - Timely communications with Mayor and Council
- **Internal Administration**
 - Financial Management
 - Human Capital Management
- **External Relations**
 - Community
 - Residents
 - Businesses
 - Intergovernmental Relations



City Attorney

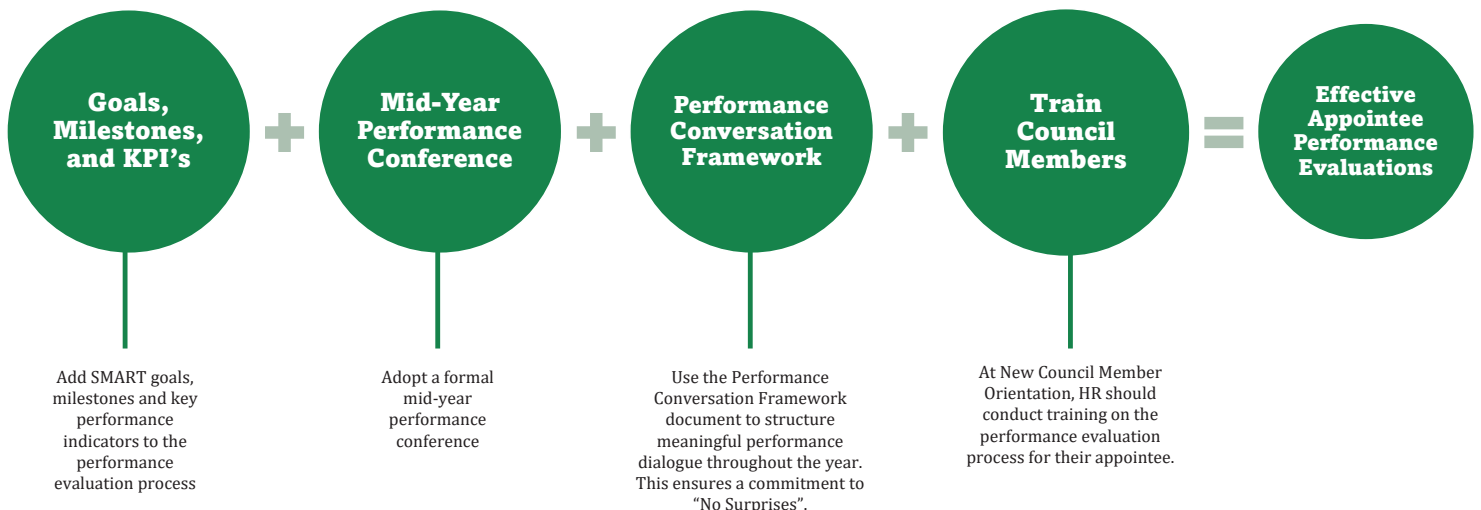
- **Legal Consultation**
 - Knowledge of State and Municipal regulations and laws
 - Advise Council on legal issues and risks
- **Leadership**
 - Sound Judgement
 - Proactive updates to Council regarding NC General Assembly and Local initiatives
- **Communications**
 - Timely responsiveness to Mayor, Council, and client department requests and concerns
- **Internal Administration**
 - Control litigation costs
- **Business Relationships**
 - Key Stakeholders
 - Internal Business Partners
 - External Business Partners



City Clerk

- **Administrative and Records Management**
 - Maintain Council records
 - Citizen's Review and Civil Service Boards
- **Exhibit Trust Inherent with Local Government**
 - Impartiality
 - Customer Service
- **Model Professional Leadership**
 - Records Management
 - Support Engagement Events
- **Communication and Responsiveness to City Council**
 - Concise/timely responses to Council and Mayor
 - Concise/timely information to public questions
- **Internal Administration**

HR RECOMMENDATIONS PERFORMING EFFECTIVE EVALUATIONS



HR RECOMMENDATIONS

HOW TO GET BACK ON TRACK► **Complete the FY2023 current cycle**

- June 12, 2023: City Attorney
- June 26, 2023: City Manager
- July 10, 2023: City Clerk

► **Begin FY2024**

- Foundation: January 2023 Strategic Priorities
- June-July 2023: Identify Key Performance Indicators, Set Goals and Critical Milestones
- Mid-Year: Full Council Closed Session Performance Conversation
- June 2024: End of Year Performance Evaluation

Discussion and Questions