

ADMINISTRATION DEPARTMENT - Town Manager

Section 1

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Section 2

Management Duties: Oversees the efficient operation of the assigned areas of responsibility.

Ratings

1. Utilizes and adheres to all established town administrative and personnel policies and procedures. Updates and changes policies as need.	3.5
2. Directs the operation of the town in a manner that maximizes the efficiency and productivity of all resources.	3.5
3. Completes all work activities in an accurate and timely manner.	3.5
4. Maintains a positive working relationship with citizens and town employees.	4
5. Prepares the town's annual budget in an accurate and timely manner.	3.5
6. Manages the town budget to assure sound fiscal control and compliance.	3.5
7. Adapts to and effectively deals with unanticipated conditions and situations.	4
8. Review all continuing contracts annually, make appropriate recommendations to commission.	3
9. Faithfully executes all laws, provisions of the town charter, policies, and acts of the commission per Sec. 3.05 (d)	3.5
10. Submit to commission a summary report on the finances and administrative activities of the town within sixty (60) days of the end of each fiscal year.	3

$$35 / 10 = 3.889 \times .33 = 1.283$$

COMMENTS: JP has consistently done an excellent job in his first year as town manager.

Section 3

Commission Facilitation: Responsible for informing and updating the town commission and implementing their policy in order to ensure the effective management and well being of the town.

1. Keeps the commission informed in a timely manner about issues related to the commission's policy making role.	2.5
2. Demonstrates the ability to interact with the town's elected officials.	4
3. Commission policy is implemented consistently, effectively and sufficiently articulated to staff, press and residents.	3.5
4. Commission policy and directions are carried out in a timely fashion.	3
5. Develops effective and accurate presentations for discussion at commission meetings.	3.5
6. Action Plan developed by staff and presented to commission after every commission meeting.	3

$$19.5 / 6 = 3.250 \times .33 = 1.073$$

COMMENTS:

Note: In this section, the supervisor must add supporting comments for ratings (i.e., individual ratings, or total ratings) where performance greatly exceeds performance standards and when performance is marginal or unsatisfactory. These comments should serve to highlight and document areas of highly effective and ineffective performance.

Comments concerning performance that greatly exceeds performance standards:
Handling of Hurricane Irma
Conversion to program-based budgeting
Embracing of vision and long-term planning process
Handling of the noose situation - both internally with staff and externally with BCC and the media

Comments concerning performance that is marginal or unsatisfactory:
Communication/Infrastructure issues mentioned previously (which I am confident JP has learned from and will not happen again)

SIGN-OFF:

Title _____	Title _____
Signature _____	Signature _____
Date _____	Date _____

Assistant Town Manager: _____ **Date:** _____

Employee Sign-Off:

This performance appraisal has been thoroughly reviewed with me by my supervisor. My signature acknowledges that the appraisal meeting occurred and that I received a copy of this document. It does not necessarily mean that I agree with the overall appraisal or any of the individual parts.

Employee:  _____ **Date:** 11/30/18

Employee Comments: _____

TOWN OF BELLEAIR PERFORMANCE APPRAISAL SYSTEM ADMINISTRATION DEPARTMENT - Town Manager

Section I

This section intentionally left blank.

Section 2

Management Duties: Oversees the efficient operation of the assigned areas of responsibility.

Ratings

1. Utilizes and adheres to all established town administrative and personnel policies and procedures. Updates and changes policies as need.	4
2. Directs the operation of the town in a manner that maximizes the efficiency and productivity of all resources.	4
3. Completes all work activities in an accurate and timely manner.	3
4. Maintains a positive working relationship with citizens and town employees.	3
5. Prepares the town's annual budget in an accurate and timely manner.	4
6. Manages the town budget to assure sound fiscal control and compliance.	4
7. Adapts to and effectively deals with unanticipated conditions and situations.	4
8. Review all continuing contracts annually, make appropriate recommendations to commission.	4
9. Faithfully executes all laws, provisions of the town charter, policies, and acts of the commission per Sec. 3.05 (d)	4
10. Submit to commission a summary report on the finances and administrative activities of the town within sixty (60) days of the end of each fiscal year.	4

$38 / 10 = 3.800 \quad x .33 = 1.254$

COMMENTS: I understand the Chief hiring was complicated, but I do think the decision could have been made more quickly, allowing for a longer transition time. I do appreciate JP's attention to the budget and his thoroughness as it relates to the budget process. Regarding his interacting with Town staff, this is not something I am able to observe. I would be open to the idea of a Start, Stop, Continue survey with Town Staff

Section 3

Commission Facilitation: Responsible for informing and updating the town commission and implementing their policy in order to ensure the effective management and well being of the town.

1. Keeps the commission informed in a timely manner about issues related to the commission's policy making role.	4
2. Demonstrates the ability to interact with the town's elected officials.	4
3. Commission policy is implemented consistently, effectively and sufficiently articulated to staff, press and residents.	4
4. Commission policy and directions are carried out in a timely fashion.	4
5. Develops effective and accurate presentations for discussion at commission meetings.	4
6. Action Plan developed by staff and presented to commission after every commission meeting.	4

$24 / 6 = 4.000 \quad x .33 = 1.320$

COMMENTS: I appreciate JP's Town Manager's reports he offers at every commission meeting. He communicates with me in a timely manner and makes himself available to talk at any hour and day of the

TOWN OF BELLEAIR PERFORMANCE APPRAISAL SYSTEM

communicates with me in a timely manner and makes himself available to talk at any hour and day of the week. When communicating, he keeps me informed on what is important while avoiding the nugacity.

Section 4

Municipal Stewardship- Responsible for the supervision and management of the internal affairs with the Town of Belleair

- | | |
|--|---|
| 1. Basic Town services are being delivered in an efficient and timely manner. | 4 |
| 2. Ensures that town employees are cognizant of creating good public relations and efficiency in the performance of their duties. | 4 |
| 3. Citizens concerns and complaints are handled in a respectful and effective manner. | 4 |
| 4. Provides leadership and direction in the development of short and long range plans. | 4 |
| 5. Maintains good intergovernmental relations with contracted service delivery organizations and other governmental agencies in representing the Town of Belleair. | 4 |
| 6. Presents Commission policies and positions on issues to the citizens and town organizations accurately, equitably, and effectively. | 4 |
| 7. Attends or sends a representative to attend all decision making boards in the Town to ensure boards are properly administering their duties. | 4 |

$28 / 7 = 4.000 \times .34 = 1.360$

COMMENTS: JP demonstrates prudent stewardship. It also appears that he has the respect of Staff, residents and vendors. He looks out for the best interest of the Town in a respectful manner.

TOTAL RATING 3.934 CONVERTS TO 3.000 % INCREASE

PREPARED BY: Michael Wilkinson/Commissioner
Print Name

Section 5

Narrative- Informative overview of the town manager's performance

1. Please describe what you are most pleased with regarding the Town Manager's performance.

I appreciate his communication style, respectfulness and stewardship (especially as it pertains to the budget).

2. Please describe how the Town manager could improve.

As JP is early in his tenure as Town Manager, I think as good as he as performed, he will continue to look for ways to improve his performance. I am very pleased with how he is handling his role.

COMMENTS:

Note: In this section, the supervisor must add supporting comments for ratings (i.e., individual ratings, or total ratings) where performance greatly exceeds performance standards and when performance is marginal or unsatisfactory. These comments should serve to highlight and document areas of highly effective and ineffective performance.

Comments concerning performance that greatly exceeds performance standards:

Comments concerning performance that is marginal or unsatisfactory:


SIGN-OFF:

Title	_____	Title	_____
Signature	_____	Signature	_____
Date	_____	Date	_____

Assistant Town Manager: _____ **Date:** _____

Employee Sign-Off:

This performance appraisal has been thoroughly reviewed with me by my supervisor. My signature acknowledges that the appraisal meeting occurred and that I received a copy of this document. It does not necessarily mean that I agree with the overall appraisal or any of the individual parts.

Employee:  _____ **Date:** 11/30/18

Employee Comments: _____

**TOWN OF BELLEAIR
PERFORMANCE APPRAISAL SYSTEM
ADMINISTRATION DEPARTMENT - Town Manager**

Section 1

This section intentionally left blank.

Section 2

Management Duties: Oversees the efficient operation of the assigned areas of responsibility.

Ratings

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|--|---|---|---|---|---|---|---|---|---|--|---|--|---|
| <ol style="list-style-type: none"> 1. Utilizes and adheres to all established town administrative and personnel policies and procedures. Updates and changes policies as need. 2. Directs the operation of the town in a manner that maximizes the efficiency and productivity of all resources. 3. Completes all work activities in an accurate and timely manner. 4. Maintains a positive working relationship with citizens and town employees. 5. Prepares the town's annual budget in an accurate and timely manner. 6. Manages the town budget to assure sound fiscal control and compliance. 7. Adapts to and effectively deals with unanticipated conditions and situations. 8. Review all continuing contracts annually, make appropriate recommendations to commission. 9. Faithfully executes all laws, provisions of the town charter, policies, and acts of the commission per Sec. 3.05 (d) 10. Submit to commission a summary report on the finances and administrative activities of the town within sixty (60) days of the end of each fiscal year. | <table border="1" style="margin: 0 auto;"> <tr><td style="width: 30px; height: 20px;">3</td></tr> <tr><td style="width: 30px; height: 20px;">4</td></tr> <tr><td style="width: 30px; height: 20px;">4</td></tr> <tr><td style="width: 30px; height: 20px;">4</td></tr> <tr><td style="width: 30px; height: 20px;">4</td></tr> <tr><td style="width: 30px; height: 20px;">4</td></tr> <tr><td style="width: 30px; height: 20px;">3</td></tr> <tr><td style="width: 30px; height: 20px;">4</td></tr> <tr><td style="width: 30px; height: 20px;"> </td></tr> <tr><td style="width: 30px; height: 20px;">4</td></tr> <tr><td style="width: 30px; height: 20px;"> </td></tr> <tr><td style="width: 30px; height: 20px;">4</td></tr> </table> | 3 | 4 | 4 | 4 | 4 | 4 | 3 | 4 | | 4 | | 4 |
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38 /10 = 4.222 x .33 = 1.393

COMMENTS: We have updated some of our ordinances.

Section 3

Commission Facilitation: Responsible for informing and updating the town commission and implementing their policy in order to ensure the effective management and well being of the town.

- | | | | | | | | | |
|---|--|---|---|--|---|---|---|---|
| <ol style="list-style-type: none"> 1. Keeps the commission informed in a timely manner about issues related to the commission's policy making role. 2. Demonstrates the ability to interact with the town's elected officials. 3. Commission policy is implemented consistently, effectively and sufficiently articulated to staff, press and residents. 4. Commission policy and directions are carried out in a timely fashion. 5. Develops effective and accurate presentations for discussion at commission meetings. 6. Action Plan developed by staff and presented to commission after every commission meeting. | <table border="1" style="margin: 0 auto;"> <tr><td style="width: 30px; height: 20px;">3</td></tr> <tr><td style="width: 30px; height: 20px;">4</td></tr> <tr><td style="width: 30px; height: 20px;"> </td></tr> <tr><td style="width: 30px; height: 20px;">4</td></tr> <tr><td style="width: 30px; height: 20px;">4</td></tr> <tr><td style="width: 30px; height: 20px;">4</td></tr> <tr><td style="width: 30px; height: 20px;">4</td></tr> </table> | 3 | 4 | | 4 | 4 | 4 | 4 |
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23 /6 = 3.833 x .33 = 1.265

COMMENTS: JP did a great job on the short term objectives and start plan.

COMMENTS:

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Comments concerning performance that greatly exceeds performance standards:
Communications with the Citizens & Commission are are greatly improved.

Comments concerning performance that is marginal or unsatisfactory: None

SIGN-OFF:

Title _____	Title _____
Signature _____	Signature _____
Date _____	Date _____

AssistantTown Manager: _____ **Date:** _____

Employee Sign-Off:

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Employee: _____ **Date:** _____

Employee Comments: _____

**TOWN OF BELLEAIR
PERFORMANCE APPRAISAL SYSTEM
ADMINISTRATION DEPARTMENT - Town Manager**

Section 1

Goals and Objectives: Fiscal Year: 2017/2018

Ratings

- 1.
- 2.
- 3.
- 4.

$0 / 4 = 0.000 \times .25 = 0.000$

COMMENTS:

Section 2

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Ratings

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4
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4

$0 / 10 = 0.000 \times .25 = 0.000$

COMMENTS:

Overall good performance. I think by next review the 3's will be 4's. Learned some valuable lessons this year.

Section 3

TOWN OF BELLEAIR PERFORMANCE APPRAISAL SYSTEM

Commission Facilitation: Responsible for informing and updating the town commission and implementing their policy in order to ensure the effective management and well being of the town

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4. Commission policy and directions are carried out in a timely fashion.
5. Develops effective and accurate presentations for discussion at commission meetings.
6. Action Plan developed by staff and presented to commission after every commission meeting

4
4

3
3
3
2

$0 / 6 = 0.000 \times .25 = 0.000$

COMMENTS: Overall a good job in commission facilitation. Would like to see commission policy presented to residents in formats that reach them. Continue to develop a good relationship with media that promotes good based and accurate information. Improve presentations at commission.

Section 4

Municipal Stewardship- Responsible for the supervision and management of the internal affairs with the Town of Belleair

1. Basic Town services are being delivered in an efficient and timely manner.
2. Ensures that town employees are cognizant of creating good public relations and efficiency in the performance of their duties.
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6. Presents Commission policies and positions on issues to the citizens and town organizations accurately, equitably, and effectively.
7. Attends or sends a representative to attend all decision making boards in the Town to ensure boards are properly administrating their duties.

4

4
3
3

4

3

4

$0 / 7 = 0.000 \times .25 = 0.000$

COMMENTS: Great job in emphasis of Core Values. Would like to see that follow up with staff has been completed when dealing with a residents concern.

TOTAL RATING 0.000 CONVERTS TO 0.000 % INCREASE

PREPARED BY:

Karla D Rettstatt
Print Name

Section 5

Narrative- Informative overview of the town managers performance

Please describe what you are most pleased with regarding the Town Manager's performance.

The transition of new town manager position went very well. From the outside it appeared that through the town manager's guidance, staff adjusted to the new roles, responsibilities and embraced the changes in style and priorities. Town manager has led by example which leads everyone down the same path. Good direction was given to effectively manage the aftermath of Hurricane Irma and residents were very grateful. The roll out of the CORE value philosophy gives employees a clear direction on how to interact, inform, and educate our residents. Again residents will benefit from this. The implementation of the new-line budgeting process was long overdue and will benefit the town in the future. Budget presentations were timely and effective.

Please describe how the manager could improve.

The past year and half has been a year of transition and growth. Look forward to the following opportunities.

1. Continued education of the CORE Values. Follow up with staff assigned to residents issues and concerns. One example: SeeClickFix . Were the issues resolved and completed? Follow up with commission on status.
2. Continue to improve the new-line budgeting process by department. Raise the level of staff education to the

financial opportunities and restraints that are unique to Belleair. All departments should embrace this budget analysis process.

3. Continue to work with the commission and boards to fine tune the long term strategic plan to include yearly short term goals.
4. Evaluate, update and improve the CIP plan by incorporating the EOR, and recommendations from finance board, infrastructure board and commission.
5. Continue to find ways to improve and reach the diversity of residents of Belleair. Example: Look at ways to maximize the reach of our older residents who might not use the forms technology the town uses. Fully understand the desires and priorities of the residents. Improve the board and commission meetings for the residents who attend. Make presentations as easy to follow as possible.