

## **MANAGEMENT PERFORMANCE AND DEVELOPMENT APPRAISAL**

### **CITY OF McMinnville CITY MANAGER**

#### **PURPOSE**

In order to establish and maintain effective City Council and Manager Relationships, it is essential that the Council establish an ongoing evaluation process that offers an opportunity for each party to review the performance of the City Manager. This evaluation should focus on how effectively the City Manager is accomplishing the goals established by the City Council and how the City Manager is carrying out responsibilities in key performance areas including technical expertise as a City Manager, communications with staff, Council, and partners, and overall direction and operation of the City.

Specifically, the evaluation should serve the following needs:

1. Allow the City Manager and the Council to test, identify, and refine their respective roles, relationships, expectations of and responsibilities to each other.
2. Allow discussion of the City Manager's strengths and weaknesses as demonstrated by past performance with the objective of increasing the City Manager's effectiveness; that is, give the Council the opportunity to provide positive feedback in areas that have been handled well and to outline clearly areas where the City Manager could become even more effective through improved performance.

#### **PROCESS**

*The evaluation process shall occur annually in June, except that the Council may request an evaluation at any time during the year if need arises.*

1. Evaluation forms are distributed by the Mayor to all City Councilors and the City Manager.
2. Each Councilor and the City Manager complete the forms, sign them, and return one copy to the City Attorney who will forward all evaluations to the Mayor.
3. The Mayor tabulates the results of the Councilor evaluation forms.
4. Prior to the evaluation session, the City Manager will provide a memorandum to the Council including a self-evaluation using the same format and a summary of progress toward Council goals.
5. The Councilor composite evaluation and the City manager's self-evaluation are distributed to the Council by the Mayor prior to the executive session evaluation meeting. A copy of the Councilor composite evaluation is provided to the City Manager by the Mayor prior to the evaluation meeting.
6. The Council and Mayor meet with the City Manager in executive session (open session if requested by the City Manager) to jointly review the evaluation.

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### CITY OF McMinville CITY MANAGER

#### INSTRUCTIONS

Attached is the evaluation form for the City Manager. It encompasses three primary areas:

- 1) Evaluation of key performance areas;
- 2) Goals accomplishment;
- 3) General strengths and areas for improvement.

The rating system for the key performance areas is a somewhat subjective scale of excellent (EXC), good (GD), satisfactory (SAT), needs improvement (NI), unsatisfactory (UNS), and no observation (NO). A rating of excellent generally means that the City Manager consistently exceeds the expected level of performance. Good generally means that the City Manager consistently fulfills the requirements of the job and occasionally performs beyond expectations. Satisfactory performance means the City Manager normally fulfills the requirements of the job. Needs improvement means the City Manager generally meets the requirements of the job, but there may be one or more areas that the City Manager must work to correct to move forward. Unsatisfactory means the City Manager consistently fails to fulfill the requirements of the job.

A space to the right of each performance area has been included for individual comments. Each person preparing the form is encouraged to select a specific example or two of why, overall, a particular rating has been chosen. The comments included will give the City Manager enough information to correct problem areas and place a specific item on their work plan for the next year,

Upon completion of the form, please return it to the **City Attorney** who will forward to the Mayor for review and tabulation.

**NOTE:** *Please sign the form prior to returning it to the City Attorney.*

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
I. Communications with Council							
A) Timely and effective written communication with Council	✓						Regular correspondence
B) Timely and effective informal communication with Council	✓						
C) Maintains close communications with Mayor		✓					

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
II. Implementation of Council Policy							
A) Administers Council policy decisions consistent with Council intent	✓						
B) Assists Council in development of goals and strategic planning	✓						Clear communication allows Council to set & maintain manageable goals
C) Consults with Mayor and Council on Major issues that impact City Operations	✓						

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
III. Staff Support for Council							
A) Anticipates issues which require Council involvement	✓						
B) Provides clear, concise staff reports with alternatives and recommendations		✓					Memos could include more options and potential outcomes.
C) Provides Mayor and Council with input as requested at City Council Meetings and other City meetings.	✓						Councilors often work through too many scenarios while in session. Manager may have already vetted that scenario. Memo
D) Shares leadership responsibilities with Council and Mayor	✓						

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
IV. Leadership							
A) Provides organizational leadership	✓						
B) City Manager exhibits confidence and respect for management teams involvement in decision making process.	✓						
C) Recruits and hires staff involving Council or Council members on Management Team hires that have major impact on community relationships and partnerships.			✓				Other than Council decisions, I am unaware of Staff changes until after the fact. That said, the City Manager <del>understands</del> maintains a professional & educated team.
D) Evaluates staff regularly and fairly involving staff in evaluation process.	✓						Excellent feedback from Dept Heads
E) Manager and staff maintain current knowledge of City issues		✓					100%
F) Evaluates and adjusts City programs and relationships as necessary	✓						
G) Develops professionalism	✓						

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
<b>V. Financial Planning and Administration</b>							
A) Annual budget is prepared in timely manner providing Council with options for funding special programs and partner requests.	✓						
B) Budget is well documented and organized to assist Council with policy decisions	✓						
C) Effective administrative budget controls are in place		✓					
D) Staff maintains a multi-year financial vision			✓				While not in a deficit, an austerity plan could allow us to better support our understaffed departments

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

C. General public feedback does not support this statement. With such a large budget to manage, how can discretionary spending align with public perception? This is a challenge for Council and Management.

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
<b>VI. Personal and Professional Development</b>							
A) Keeps abreast of current City information and technology changes in municipal affairs	✓						
B) Displays and practices effective oral and written communication skills	✓						
C) Copes with adverse situations without impacting physical, mental, or emotional health of Council, management team, and staff.		✓					
D) Uses personal skills (Judgment, diplomacy, imagination, etc.) to facilitate providing City services and implementing City projects and programs	✓						

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
<b>VII. Delivery of City Services and Community Relations</b>							
A) Services meet the changing needs of McMinnville citizens and businesses.		✓					
B) Services are delivered efficiently and effectively		✓					
C) Manager is accessible to citizens	✓						
D) Manager is open to suggestions from Council, staff, and public on improvements in services	✓						
E) Maintains effective city news media relationships	✓						Effective, perhaps not always desired but effective.
F) Disseminates accurate information about City issues		✓					
G) Encourages public participation	✓						
H) Generally maintains overall public confidence in City management	✓						

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
<b>VII. Intergovernmental Relationships</b>							
A) Maintains and promotes effective communications with local, regional, State, and federal government agencies.	✓						<i>Partially</i> <i>e.g. Airport</i>
B) Financial resources (grants) from other organizations are pursued where possible.		✓					<i>e.g. Airport</i>
C) Contributes to good government through participation in local, regional, and State committees & organizations	✓						
D) Works constructively with other jurisdictions toward mutual goals	✓						<i>Re: e.g. Fire District</i>
E) Establishes effective, cooperative relationships with other public and private entities	✓	✓					

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

List specific examples if needed to explain remarks provided.

**ACCOMPLISHMENTS:** Has the City Manager effectively accomplished or worked towards accomplishing the goals established by the City Council? Why or why not?

Airport Development - huge improvements  
Tourism - maybe too good  
Homelessness - working on it  
Urban Renewal - continued progress  
Transportation - good progress  
VIT - major improvements  
Riverbed - some progress  
Economic Dev. - more support  
needed for MEDP  
needed

**STRENGTHS:** Based upon your overall evaluation of the City Manager, what areas would you list as her strong points as a manager?

Communication  
Clarity of communication  
Effectiveness, results oriented

**IMPROVEMENTS SUGGESTED:** Based upon your overall evaluation, what areas would you suggest the City Manager work on to improve her skills and to be even more effective? Please be as specific as possible.

Public Relations - For as stellar of a job as the City Manager is doing,  
I wish the public knew it.

Councilor Name: \_\_\_\_\_

Date: \_\_\_\_\_

6/30/16

Return to David Koch, City Attorney by Friday, June 24<sup>th</sup> 5:00 PM.

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KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
<b>I. Communications with Council</b>							
A) Timely and effective written communication with Council			x				Great written communication with the council packets and general e-mail communication from time to time.
B) Timely and effective informal communication with Council		x					I sit on numerous committee assignments with Martha so we have many opportunities to communicate informally. Those informal sessions are very much appreciated.
C) Maintains close communications with Mayor						x	

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
<b>II. Implementation of Council Policy</b>							
A) Administers Council policy decisions consistent with Council intent		x					For the most part I feel we are on the same page. However there have been times where Martha has moved forward with commitments and or statements that have maybe somewhat commuted the council before our discussion. Homelessness is an example.
B) Assists Council in development of goals and strategic planning				x			This year have been a departure from our previous goal setting and strategic planning process. I feel that as of June we are stay without the direction and or plan that we normally would have at this time. I feel Martha has headed in a different planning process without the full communication or support of the council. We need to solidify this as soon as possible.
C) Consults with Mayor and Council on Major issues that impact City Operations		x					This is a hard area to comment on. Martha runs the city effectively and operations seem to be in great shape. I don't have knowledge on the relationship with the Mayor in their communication on major topics. Good process with the community choices committee on the website and community survey rollout. We have involved numerous community members with experience and skill.

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KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
<b>III. Staff Support for Council</b>							
A) Anticipates issues which require Council involvement		x					I feel with the outreach the Martha has with the community she has listened well to their concerns and does a good job of anticipating council issues. She does start involvement sometimes premature to the needed discussion with the council. I feel that the council planning process for 2016 is still undone and we are not as prepared for this coming year.
B) Provides clear, concise staff reports with alternatives and recommendations	x						Staff reports for use with council agenda are complete and concise. They help us prepare for upcoming council meetings. We need to continue to invite our department heads to our dinner meetings.
C) Provides Mayor and Council with input as requested at City Council Meetings and other City meetings.	x						The direction for staff and Martha seems to be taken well and acted upon as given in council meetings. The council discussion's seem to be complete with good input from staff as called upon.
D) Shares leadership responsibilities with Council and Mayor		x					Excellent job in providing leadership with staff and partnering with council as a leader.

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
<b>IV. Leadership</b>							
A) Provides organizational leadership		x					
B) City Manager exhibits confidence and respect for management teams involvement in decision making process.		x					From all appearances there has been developed confidence and respect among her management style. She listens to their input within the meetings I attend.
C) Recruits and hires staff involving Council or Council members on Management Team hires that have major impact on community relationships and partnerships.		x					We have had great success in our hires with Martha in the role of city manager.
D) Evaluates staff regularly and fairly involving staff in evaluation process.						x	I have not seen the evaluation process of staff. We need more review at the council level in this process.
E) Manager and staff maintain current knowledge of City issues		x					City and staff are current on the issues facing us.
F) Evaluates and adjusts City programs and relationships as necessary		x					We need to continue to develop our plan and priorities for 2016.
G) Develops professionalism		x					

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KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
<b>V. Financial Planning and Administration</b>							
A) Annual budget is prepared in timely manner providing Council with options for funding special programs and partner requests.	x						I felt the McMinnville products one of the best budgets within the state of Oregon. As we move forward with numerous needs and limited resources, we may need to have more input in critical areas of the budget before budget committee.
B) Budget is well documented and organized to assist Council with policy decisions	x						Very much so!
C) Effective administrative budget controls are in place	x						Yes
D) Staff maintains a multi-year financial vision	x						Yes

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
<b>VI. Personal and Professional Development</b>							
A) Keeps abreast of current City information and technology changes in municipal affairs	x						
B) Displays and practices effective oral and written communication skills	x						Martha is a superior communicator.
C) Copes with adverse situations without impacting physical, mental, or emotional health of Council, management team, and staff.		x					Has a level headed approach with adverse situations. However, sometimes has been premature in her statements before council discussions.
D) Uses personal skills (Judgment, diplomacy, imagination, etc.) to facilitate providing City services and implementing City projects and programs		x					Yes

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
<b>VII. Delivery of City Services and Community Relations</b>							
A) Services meet the changing needs of McMinnville citizens and businesses.		x					Spends a good amount of time within the community understanding their needs.
B) Services are delivered efficiently and effectively		x					Yes, yet more stress is being placed on services, daily.
C) Manager is accessible to citizens	x						Goes out of her way to be accessible to the citizens of McMinnville.
D) Manager is open to suggestions from Council, staff, and public on improvements in services		x					
E) Maintains effective city news media relationships		x					
F) Disseminates accurate information about City issues		x					
G) Encourages public participation	x						
H) Generally maintains overall public confidence in City management		x					

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
<b>VII. Intergovernmental Relationships</b>							
A) Maintains and promotes effective communications with local, regional, State, and federal government agencies.		x					I feel Martha is well respected with other agencies within our area. She is seen as a leader.
B) Financial resources (grants) from other organizations are pursued where possible.			x				We need to take more advantage of other resources.
C) Contributes to good government through participation in local, regional, and State committees & organizations	x						Very much so.
D) Works constructively with other jurisdictions toward mutual goals		x					
E) Establishes effective, cooperative relationships with other public and private entities	x						This is an area Martha excels in.

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

**List specific examples if needed to explain remarks provided.**

**ACCOMPLISHMENTS:** Has the City Manager effectively accomplished or worked towards accomplishing the goals established by the City Council? Why or why not?

During 2015 our council and city goals had been addressed and monitored on a quarterly basis. The process for the year seemed to mirror previous years with a focused effort and direction taken. As in pasted years we have items that were not completely accomplished, however there was signification success in all areas.

**STRENGTHS:** Based upon your overall evaluation of the City Manager, what areas would you list as her strong points as a manager?

Community leadership, talking with and connecting with our major partners with the city. She is full of energy and leads in a proactive style. We have seen movement in the management team, however styles seem to have blended together will. Financially well informed and moving us into a more proactive use of our dollars, we need to address numerous areas and Martha is moving in that direction. Overall Martha shows great leadership within her role as city manager.

**IMPROVEMENTS SUGGESTED:** Based upon your overall evaluation, what areas would you suggest the City Manager work on to improve her skills and to be even more effective? Please be as specific as possible.

This year we seemed to have a breakdown on setting our goals and priorities, a different outcome from previous years. I felt that Martha took too much ownership in the process and we lost the input from Sue. As of June, I have not seen the same list of priorities that we started to develop in our goal setting process. Martha may want to drive that process differently, however this needs to be more flushed out with the council and Mayor. Also as we address budget concerns in the upcoming years, we need to have more dialog with council before the budget committee time. Quarterly face time with each councilor would help develop a strong council, with the agreement of those involved.

Councilor Name:

Date: June 21, 2016

**Return to David Koch, City Attorney by Friday, June 24<sup>th</sup> 5:00 PM.**

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**NOTE:** *Please sign the form prior to returning it to the City Attorney.*

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
<b>I. Communications with Council</b>							
A) Timely and effective written communication with Council			x				There have been a lot of topics that Martha has been pretty good at keeping us in the loop on initially. Much of that communication has slowed or stopped. I would like to be more informed on public related issues like homelessness, Pot, and economic development.
B) Timely and effective informal communication with Council				x			There have been a number of times when Martha has requested Emails be returned. This is not a good practice.
C) Maintains close communications with Mayor						x	I have not witnessed this first hand.

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
<b>II. Implementation of Council Policy</b>							
A) Administers Council policy decisions consistent with Council intent			x				
B) Assists Council in development of goals and strategic planning					x		The last two goal setting sessions were a little odd. I got the feeling that staff's ideas were not made apparent to the council. Also, Martha sort of took over large parts of the meeting.
C) Consults with Mayor and Council on Major issues that impact City Operations					x		While Martha may speak to council on operational issues, there have been times when she has acted inconstant with the direction of the council.

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
<b>III. Staff Support for Council</b>							
A) Anticipates issues which require Council involvement			x				
B) Provides clear, concise staff reports with alternatives and recommendations				x			I would always like more information and options to pressing problems facing the council
C) Provides Mayor and Council with input as requested at City Council Meetings and other City meetings.			x				
D) Shares leadership responsibilities with Council and Mayor			x	x			Sometimes this is ok, sometimes she needs to work on it.

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
<b>IV. Leadership</b>							
A) Provides organizational leadership			x				I respect her desire to support and defend her staff.
B) City Manager exhibits confidence and respect for management teams involvement in decision making process.				x			I would like to hear more from management at goal setting. I worry that Martha's speaking for them a little too much at times. While they do report directly to her, I would appreciate hearing from them more. It is the council's responsibly to manage public resources, not the City Managers.
C) Recruits and hires staff involving Council or Council members on Management Team hires that have major impact on community relationships and partnerships.			x				
D) Evaluates staff regularly and fairly involving staff in evaluation process.						x	
E) Manager and staff maintain current knowledge of City issues			x				
F) Evaluates and adjusts City programs and relationships as necessary				x			I don't see public information/communications as a strength. Often I feel Martha says and does things that is politically dangerous.
G) Develops professionalism						x	I am not aware of any course work or training she has completed since joining the city.

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<b>V. Financial Planning and Administration</b>							
A) Annual budget is prepared in timely manner providing Council with options for funding special programs and partner requests.				x			Having missed major parts of the budget process I can only talk to issues I've witnessed. The handling of the COG membership was regretful. A comment she made suggesting that in order to fully fund the police we would have to close the library was totally out of line and politically dangerous.
B) Budget is well documented and organized to assist Council with policy decisions			x				
C) Effective administrative budget controls are in place			x				
D) Staff maintains a multi-year financial vision			x				

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
<b>VI. Personal and Professional Development</b>							
A) Keeps abreast of current City information and technology changes in municipal affairs						x	
B) Displays and practices effective oral and written communication skills				x			I think we are all guilty of this, I know I sure am. Some of her emails have typos in them. There have also been a few times when the message was requested to be rescinded. She may need to take a little more time before hitting send. Trust me, I struggle with that my self. I know how hard it is.
C) Copes with adverse situations without impacting physical, mental, or emotional health of Council, management team, and staff.					x		During council meetings it is extremely important that the mayor leads the meeting. If someone is out of line it the mayor's job to do something about it. There have been a few times when Martha has come close to crossing the line. I respect her assertiveness, but it could undermined the strength of the council and Mayors role.
D) Uses personal skills (Judgment, diplomacy, imagination, etc.) to facilitate providing City services and implementing City projects and programs					x		I have witnessed more bad example than good in regards to her diplomacy, judgment and political navigation. She tends to appear to loos her cool quickly with the public and staff both during council meetings and in meetings with the public.

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
<b>VII. Delivery of City Services and Community Relations</b>							
A) Services meet the changing needs of McMinnville citizens and businesses.			x				I have heard both praise and complaints
B) Services are delivered efficiently and effectively			x				
C) Manager is accessible to citizens			x				
D) Manager is open to suggestions from Council, staff, and public on improvements in services			x				
E) Maintains effective city news media relationships					x		Given my lack of confidence in her ability to communicate accurately the council's intent, I would recommend that she not be authorized to speak to the media on behalf of the council until she has received some PIO training and has demonstrated that she understands her role as an administrator, not a policy maker. That said, I would suggest that all media inquires go through the city attorney or the Mayor.
F) Disseminates accurate information about City issues				x			
G) Encourages public participation			x				
H) Generally maintains overall public confidence in City management				x			See other comments.

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
<b>VII. Intergovernmental Relationships</b>							
A) Maintains and promotes effective communications with local, regional, State, and federal government agencies.		x					She seems on top of some major regional issues.
B) Financial resources (grants) from other organizations are pursued where possible.						x	
C) Contributes to good government through participation in local, regional, and State committees & organizations						x	I believe she should be a part of these organizations but haven't heard that she is.
D) Works constructively with other jurisdictions toward mutual goals						n	
E) Establishes effective, cooperative relationships with other public and private entities			x	x			I have heard both good and bad feedback on this.

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

**List specific examples if needed to explain remarks provided.**

**ACCOMPLISHMENTS:** Has the City Manager effectively accomplished or worked towards accomplishing the goals established by the City Council? Why or why not?

**STRENGTHS:** Based upon your overall evaluation of the City Manager, what areas would you list as her strong points as a manager?

**IMPROVEMENTS SUGGESTED:** Based upon your overall evaluation, what areas would you suggest the City Manager work on to improve her skills and to be even more effective? Please be as specific as possible.

Councilor Name: \_\_\_\_\_ Date: \_\_July 7, 2016 \_\_\_\_\_

**Return to David Koch, City Attorney by Friday, June 24<sup>th</sup> 5:00 PM.**

## **MANAGEMENT PERFORMANCE AND DEVELOPMENT APPRAISAL**

### **CITY OF McMinnville CITY MANAGER**

#### **INSTRUCTIONS**

Attached is the evaluation form for the City Manager. It encompasses three primary areas:

- 1) Evaluation of key performance areas;
- 2) Goals accomplishment;
- 3) General strengths and areas for improvement.

The rating system for the key performance areas is a somewhat subjective scale of excellent (EXC), good (GD), satisfactory (SAT), needs improvement (NI), unsatisfactory (UNS), and no observation (NO). A rating of excellent generally means that the City Manager consistently exceeds the expected level of performance. Good generally means that the City Manager consistently fulfills the requirements of the job and occasionally performs beyond expectations. Satisfactory performance means the City Manager normally fulfills the requirements of the job. Needs improvement means the City Manager generally meets the requirements of the job, but there may be one or more areas that the City Manager must work to correct to move forward. Unsatisfactory means the City Manager consistently fails to fulfill the requirements of the job.

A space to the right of each performance area has been included for individual comments. Each person preparing the form is encouraged to select a specific example or two of why, overall, a particular rating has been chosen. The comments included will give the City Manager enough information to correct problem areas and place a specific item on their work plan for the next year,

Upon completion of the form, please return it to the *City Attorney* who will forward to the Mayor for review and tabulation.

**NOTE:** Please sign the form prior to returning it to the City Attorney.

## MANAGEMENT PERFORMANCE AND DEVELOPMENT APPRAISAL

### CITY OF McMinnville CITY MANAGER

#### PURPOSE

In order to establish and maintain effective City Council and Manager Relationships, it is essential that the Council establish an ongoing evaluation process that offers an opportunity for each party to review the performance of the City Manager. This evaluation should focus on how effectively the City Manager is accomplishing the goals established by the City Council and how the City Manager is carrying out responsibilities in key performance areas including technical expertise as a City Manager, communications with staff, Council, and partners, and overall direction and operation of the City.

Specifically, the evaluation should serve the following needs:

1. Allow the City Manager and the Council to test, identify, and refine their respective roles, relationships, expectations of and responsibilities to each other.
2. Allow discussion of the City Manager's strengths and weaknesses as demonstrated by past performance with the objective of increasing the City Manager's effectiveness; that is, give the Council the opportunity to provide positive feedback in areas that have been handled well and to outline clearly areas where the City Manager could become even more effective through improved performance.

#### PROCESS

*The evaluation process shall occur annually in June, except that the Council may request an evaluation at any time during the year if need arises.*

1. Evaluation forms are distributed by the Mayor to all City Councilors and the City Manager.
2. Each Councilor and the City Manager complete the forms, sign them, and return one copy to the City Attorney who will forward all evaluations to the Mayor.
3. The Mayor tabulates the results of the Councilor evaluation forms.
4. Prior to the evaluation session, the City Manager will provide a memorandum to the Council including a self-evaluation using the same format and a summary of progress toward Council goals.
5. The Councilor composite evaluation and the City manager's self-evaluation are distributed to the Council by the Mayor prior to the executive session evaluation meeting. A copy of the Councilor composite evaluation is provided to the City Manager by the Mayor prior to the evaluation meeting.
6. The Council and Mayor meet with the City Manager in executive session (open session if requested by the City Manager) to jointly review the evaluation.





[illegible]

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
<b>IV. Leadership</b>							
A) Provides organizational leadership			X				
B) City Manager exhibits confidence and respect for management teams involvement in decision making process.				X			
C) Recruits and hires staff involving Council or Council members on Management Team hires that have major impact on community relationships and partnerships.		X					
D) Evaluates staff regularly and fairly involving staff in evaluation process.						X	<i>Continue this is happening</i>
E) Manager and staff maintain current knowledge of City issues		X					
F) Evaluates and adjusts City programs and relationships as necessary		X					
G) Develops professionalism		X					

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
<b>V. Financial Planning and Administration</b>							
A) Annual budget is prepared in timely manner providing Council with options for funding special programs and partner requests.			X				
B) Budget is well documented and organized to assist Council with policy decisions	X						
C) Effective administrative budget controls are in place	X						
D) Staff maintains a multi-year financial vision	X						
<b>Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)</b>							
1. Financial Planning and Administration							
2. Budget is well documented and organized to assist Council with policy decisions							
3. Effective administrative budget controls are in place							
4. Staff maintains a multi-year financial vision							
5. Financial Planning and Administration							
6. Budget is well documented and organized to assist Council with policy decisions							
7. Effective administrative budget controls are in place							
8. Staff maintains a multi-year financial vision							
9. Financial Planning and Administration							
10. Budget is well documented and organized to assist Council with policy decisions							
11. Effective administrative budget controls are in place							
12. Staff maintains a multi-year financial vision							
13. Financial Planning and Administration							
14. Budget is well documented and organized to assist Council with policy decisions							
15. Effective administrative budget controls are in place							
16. Staff maintains a multi-year financial vision							
17. Financial Planning and Administration							
18. Budget is well documented and organized to assist Council with policy decisions							
19. Effective administrative budget controls are in place							
20. Staff maintains a multi-year financial vision							
21. Financial Planning and Administration							
22. Budget is well documented and organized to assist Council with policy decisions							
23. Effective administrative budget controls are in place							
24. Staff maintains a multi-year financial vision							
25. Financial Planning and Administration							
26. Budget is well documented and organized to assist Council with policy decisions							
27. Effective administrative budget controls are in place							
28. Staff maintains a multi-year financial vision							
29. Financial Planning and Administration							
30. Budget is well documented and organized to assist Council with policy decisions							
31. Effective administrative budget controls are in place							
32. Staff maintains a multi-year financial vision							
33. Financial Planning and Administration							
34. Budget is well documented and organized to assist Council with policy decisions							
35. Effective administrative budget controls are in place							
36. Staff maintains a multi-year financial vision							
37. Financial Planning and Administration							
38. Budget is well documented and organized to assist Council with policy decisions							
39. Effective administrative budget controls are in place							
40. Staff maintains a multi-year financial vision							
41. Financial Planning and Administration							
42. Budget is well documented and organized to assist Council with policy decisions							
43. Effective administrative budget controls are in place							
44. Staff maintains a multi-year financial vision							
45. Financial Planning and Administration							
46. Budget is well documented and organized to assist Council with policy decisions							
47. Effective administrative budget controls are in place							
48. Staff maintains a multi-year financial vision							
49. Financial Planning and Administration							
50. Budget is well documented and organized to assist Council with policy decisions							
51. Effective administrative budget controls are in place							
52. Staff maintains a multi-year financial vision							
53. Financial Planning and Administration							
54. Budget is well documented and organized to assist Council with policy decisions							
55. Effective administrative budget controls are in place							
56. Staff maintains a multi-year financial vision							
57. Financial Planning and Administration							
58. Budget is well documented and organized to assist Council with policy decisions							
59. Effective administrative budget controls are in place							
60. Staff maintains a multi-year financial vision							
61. Financial Planning and Administration							
62. Budget is well documented and organized to assist Council with policy decisions							
63. Effective administrative budget controls are in place							
64. Staff maintains a multi-year financial vision							
65. Financial Planning and Administration							
66. Budget is well documented and organized to assist Council with policy decisions							
67. Effective administrative budget controls are in place							
68. Staff maintains a multi-year financial vision							
69. Financial Planning and Administration							
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71. Effective administrative budget controls are in place							
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74. Budget is well documented and organized to assist Council with policy decisions							
75. Effective administrative budget controls are in place							
76. Staff maintains a multi-year financial vision							
77. Financial Planning and Administration							
78. Budget is well documented and organized to assist Council with policy decisions							
79. Effective administrative budget controls are in place							
80. Staff maintains a multi-year financial vision							
81. Financial Planning and Administration							
82. Budget is well documented and organized to assist Council with policy decisions							
83. Effective administrative budget controls are in place							
84. Staff maintains a multi-year financial vision							
85. Financial Planning and Administration							
86. Budget is well documented and organized to assist Council with policy decisions							
87. Effective administrative budget controls are in place							
88. Staff maintains a multi-year financial vision							
89. Financial Planning and Administration							
90. Budget is well documented and organized to assist Council with policy decisions							
91. Effective administrative budget controls are in place							
92. Staff maintains a multi-year financial vision							
93. Financial Planning and Administration							
94. Budget is well documented and organized to assist Council with policy decisions							
95. Effective administrative budget controls are in place							
96. Staff maintains a multi-year financial vision							
97. Financial Planning and Administration							
98. Budget is well documented and organized to assist Council with policy decisions							
99. Effective administrative budget controls are in place							
100. Staff maintains a multi-year financial vision							

[illegible]

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
<b>VII. Delivery of City Services and Community Relations</b>							
A) Services meet the changing needs of McMinnville citizens and businesses.		X					
B) Services are delivered efficiently and effectively		X					
C) Manager is accessible to citizens		X					
D) Manager is open to suggestions from Council, staff, and public on improvements in services				X			
E) Maintains effective city news media relationships				X			
F) Disseminates accurate information about City issues			X				
G) Encourages public participation		X					
H) Generally maintains overall public confidence in City management			X				

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
VII, Intergovernmental Relationships							
A) Maintains and promotes effective communications with local, regional, State, and federal government agencies.	X						
B) Financial resources (grants) from other organizations are pursued where possible.	X						
C) Contributes to good government through participation in local, regional, and State committees & organizations	X						
D) Works constructively with other jurisdictions toward mutual goals			X				
E) Establishes effective, cooperative relationships with other public and private entities			X				

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

List specific examples if needed to explain remarks provided.

**ACCOMPLISHMENTS:** Has the City Manager effectively accomplished or worked towards accomplishing the goals established by the City Council? Why or why not?

*Yes She has met the public, been innovative, done some very positive public relations moves with the affordable housing issues.*

**STRENGTHS:** Based upon your overall evaluation of the City Manager, what areas would you list as her strong points as a manager?

*Good Communication skills both written and verbal that would be better with more depth and the encouragement of other options.*

**IMPROVEMENTS SUGGESTED:** Based upon your overall evaluation, what areas would you suggest the City Manager work on to improve her skills and to be even more effective? Please be as specific as possible.

*Work on Council Mayor and Staff communication. Become one of the group without having to micromanage it. Manager is the Leader but we expect benevolent leadership*

Councilor Name: \_\_\_\_\_ Date: 6/28/2016

Return to David Koch, City Attorney by Friday, June 24<sup>th</sup> 5:00 PM.



## City Manager Martha Meeker's Review 6.28.2016

### I Communications with Council

I.A. I find the continuous stream of council packet meeting updates from Thursday through the afternoon of the meeting to be very unhelpful. I would like a final cut off no later than Monday evening. The last meeting most of the people did not receive the rate updates for Recology. I had happened to down load it just before the meeting because we were playing with the new computers. Meetings are badly over scheduled at times and then other times there is hardly anything.

If you must update please tell us specifically what you are updating and where to find it. Please make it Prior to Monday evening.

B. I have received follow up from Martha on citizen requests. When I send out the question of a citizen to her I also try to include the department head that it pertains to. People that I receive questions from will often have a history with the City that the department head can help Martha with. I do not appreciate just dropping them on Martha. I always want feedback when this happens. Generally she has been good about this. I think the weekly email update could at times be more informative and give background information that usually is omitted.

C. I feel that Martha and the Mayor have talked at each other a lot this year, but no one has been listening well on either side. I do not feel Martha has used Rick as a resource in the manner she should. I feel she does not respect the history of the town, the staff, the council and the town's people. Good leaders do need to listen. Also Rick is Martha's boss.

On the other side, I think Rick has not been as respectful of Martha's newness in this situation and respectful of her as her own person who will be different from Kent. She has earned a level of respect I at times feel Rick has not accorded her.

### II Implementation of Policy

II. A. I think generally she does this. There are times I feel she does not have a great deal of respect for the Council and has formed obstacles to the members of Council receiving information they need to make policy decisions from staff.

I feel the obstacles are gradually coming down recently. However at the goal setting in January it was obvious the staff were not supposed to speak and Martha was doing all the directing. This resulted in a worthless day that no one felt well used. I doubt Sue Disciple will ever come back.

B. I think in some areas Martha has been very good at this: the airport focus, the affordable housing education, payroll adjustments for underpaid staff, good focus on the budget. However, at times I am puzzled by her lack of follow through when a decision has been made like not telling Dave Haugeberg that the Council made a decision not to do more than educate themselves on affordable housing this year and form a committee to that end to see what we could do to formalize the practices of prior years. No Money was supposed to be spent. It was clear it was not budgeted for. Perhaps I should ask was this your call?

C. Generally good on this one.

### III Staff Support for Council

III A. I have seen improvement in this area recently. I hope it continues.

B. As always alternatives are appreciated as long as the downside is included with each alternative.

C. Usually present at the meetings. Can sometimes be almost too supportive, but she is working on this also.

D. Sharing leadership responsibilities with the Mayor has not gone particularly well this year. One example that just jumped out at me was taking the State of the City address on herself without asking the Mayor if he wanted to give it himself and if he had the time.

Another issue that was very obvious from June 2015 till recently was Martha placing herself between the staff and the Mayor and Council. This was very obvious from June 2015 on and in the January goal setting session. It is only recently that I have seen some change in this behavior. It was like everyone was muzzled and Martha was the voice for all. That may work well in the military, but it does not in the politics of a small town.

Rumors of this centered around Mike Bissett because of his outspoken wife, but clearly other department heads were also asked to not attend council meetings and to be very careful in their remarks to the council. Those of us that have a long history with the council deeply resented this action on the City Manager's part and were very puzzled by why it has occurred. I am hopeful we will continue to see change for the better in this area.

#### IV Leadership

IV B. Please see above comments under III D.

#### V Financial Planning and Administration

V A. I liked the options for the optional spending this last budget session. Council has not been as responsible as it should be in its discretionary spending. That said they have rarely been offered the opportunity. Last year was quite an eye opener for the new City Manager. Given prior history certain members of the Council and the Mayor behaved irresponsibly. For what it is worth a long recession with no options for any optional spending might be part of the cause of such poor judgement. I really cannot think of a reason for the problem this year other than you really need to make it clear that the reserve is already spent for the succeeding years.

#### VI Personal and Professional Development

VI C. Sad to say the last year, 7.1.2015 to now, has been very rough on all the councilors, Mayor and staff. Almost every councilor has thought seriously of resigning. I do not discount that the "getting to know each other" period could have been smoother for the City Manager also. Issues that I have already addressed such as muzzling staff from the council should have been addressed by a much earlier evaluation by the council of the new City Manager. I think the greatest issue however has been the differences between the City Manager and the Mayor. It has shown up frequently in council meetings. Again we have a Mayor that wants to move on and a new City Manager with a very different management style. I find it difficult to allocate blame on this.

#### VII Delivery of City Services and Community Relations

VII D. City Manager listens and sometimes implements suggestions. She might do just the opposite. Rather unsettling to the council person/s who talk to her. Sometimes she over reacts sometimes she under reacts. More time in the position should give her better initial discernment in how to react to councilor's suggestions. Honesty is appreciated. Credit



## MANAGEMENT PERFORMANCE AND DEVELOPMENT APPRAISAL

### CITY OF McMINNVILLE CITY MANAGER

#### PURPOSE

In order to establish and maintain effective City Council and Manager Relationships, it is essential that the Council establish an ongoing evaluation process that offers an opportunity for each party to review the performance of the City Manager. This evaluation should focus on how effectively the City Manager is accomplishing the goals established by the City Council and how the City Manager is carrying out responsibilities in key performance areas including technical expertise as a City Manager, communications with staff, Council, and partners, and overall direction and operation of the City.

Specifically, the evaluation should serve the following needs:

1. Allow the City Manager and the Council to test, identify, and refine their respective roles, relationships, expectations of and responsibilities to each other.
2. Allow discussion of the City Manager's strengths and weaknesses as demonstrated by past performance with the objective of increasing the City Manager's effectiveness; that is, give the Council the opportunity to provide positive feedback in areas that have been handled well and to outline clearly areas where the City Manager could become even more effective through improved performance.

#### PROCESS

*The evaluation process shall occur annually in June, except that the Council may request an evaluation at any time during the year if need arises.*

1. Evaluation forms are distributed by the Mayor to all City Councilors and the City Manager.
2. Each Councilor and the City Manager complete the forms, sign them, and return one copy to the City Attorney who will forward all evaluations to the Mayor.
3. The Mayor tabulates the results of the Councilor evaluation forms.
4. Prior to the evaluation session, the City Manager will provide a memorandum to the Council including a self-evaluation using the same format and a summary of progress toward Council goals.
5. The Councilor composite evaluation and the City manager's self-evaluation are distributed to the Council by the Mayor prior to the executive session evaluation meeting. A copy of the Councilor composite evaluation is provided to the City Manager by the Mayor prior to the evaluation meeting.
6. The Council and Mayor meet with the City Manager in executive session (open session if requested by the City Manager) to jointly review the evaluation.

## MANAGEMENT PERFORMANCE AND DEVELOPMENT APPRAISAL

### CITY OF McMinnville CITY MANAGER

#### INSTRUCTIONS

Attached is the evaluation form for the City Manager. It encompasses three primary areas:

- 1) Evaluation of key performance areas;
- 2) Goals accomplishment;
- 3) General strengths and areas for improvement.

The rating system for the key performance areas is a somewhat subjective scale of excellent (EXC), good (GD), satisfactory (SAT), needs improvement (NI), unsatisfactory (UNS), and no observation (NO). A rating of excellent generally means that the City Manager consistently exceeds the expected level of performance. Good generally means that the City Manager consistently fulfills the requirements of the job and occasionally performs beyond expectations. Satisfactory performance means the City Manager normally fulfills the requirements of the job. Needs improvement means the City Manager generally meets the requirements of the job, but there may be one or more areas that the City Manager must work to correct to move forward. Unsatisfactory means the City Manager consistently fails to fulfill the requirements of the job.

A space to the right of each performance area has been included for individual comments. Each person preparing the form is encouraged to select a specific example or two of why, overall, a particular rating has been chosen. The comments included will give the City Manager enough information to correct problem areas and place a specific item on their work plan for the next year,

Upon completion of the form, please return it to the **City Attorney** who will forward to the Mayor for review and tabulation.

**NOTE:** *Please sign the form prior to returning it to the City Attorney.*

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
I. Communications with Council							
A) Timely and effective written communication with Council			✓				
B) Timely and effective informal communication with Council			✓				
C) Maintains close communications with Mayor						✓	

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
II. Implementation of Council Policy							
A) Administers Council policy decisions consistent with Council intent			✓				
B) Assists Council in development of goals and strategic planning			✓				
C) Consults with Mayor and Council on Major issues that impact City Operations			✓				

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
III. Staff Support for Council							
A) Anticipates issues which require Council involvement			✓				
B) Provides clear, concise staff reports with alternatives and recommendations			✓				
C) Provides Mayor and Council with input as requested at City Council Meetings and other City meetings.			✓				
D) Shares leadership responsibilities with Council and Mayor			✓				

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
<b>IV. Leadership</b>							
A) Provides organizational leadership		✓					
B) City Manager exhibits confidence and respect for management teams for management teams involvement in decision making process.			✓				
C) Recruits and hires staff involving Council or Council members on Management Team hires that have major impact on community relationships and partnerships.			✓				
D) Evaluates staff regularly and fairly involving staff in evaluation process.						✓	
E) Manager and staff maintain current knowledge of City issues		✓					
F) Evaluates and adjusts City programs and relationships as necessary			✓				
G) Develops professionalism			✓				

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
<b>V. Financial Planning and Administration</b>							
A) Annual budget is prepared in timely manner providing Council with options for funding special programs and partner requests.		✓					
B) Budget is well documented and organized to assist Council with policy decisions		✓					
C) Effective administrative budget controls are in place		✓					
D) Staff maintains a multi-year financial vision		✓					

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
<b>VI. Personal and Professional Development</b>							
A) Keeps abreast of current City information and technology changes in municipal affairs			✓				
B) Displays and practices effective oral and written communication skills			✓				
C) Copes with adverse situations without impacting physical, mental, or emotional health of Council, management team, and staff.			✓				
D) Uses personal skills (Judgment, diplomacy, imagination, etc.) to facilitate providing City services and implementing City projects and programs			✓				

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
<b>VII. Delivery of City Services and Community Relations</b>							
A) Services meet the changing needs of McMinville citizens and businesses.			✓				
B) Services are delivered efficiently and effectively			✓				
C) Manager is accessible to citizens				✓			
D) Manager is open to suggestions from Council, staff, and public on improvements in services			✓				
E) Maintains effective city news media relationships			✓				
F) Disseminates accurate information about City issues			✓				
G) Encourages public participation			✓				
H) Generally maintains overall public confidence in City management		✓					

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
<b>VII. Intergovernmental Relationships</b>							
A) Maintains and promotes effective communications with local, regional, State, and federal government agencies.			✓				
B) Financial resources (grants) from other organizations are pursued where possible.		✓					
C) Contributes to good government through participation in local, regional, and State committees & organizations				✓			
D) Works constructively with other jurisdictions toward mutual goals			✓				
E) Establishes effective, cooperative relationships with other public and private entities			✓				

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

List specific examples if needed to explain remarks provided.

**ACCOMPLISHMENTS:** Has the City Manager effectively accomplished or worked towards accomplishing the goals established by the City Council? Why or why not?

CM HAS DONE AN ADEQUATE JOB AT THIS POINT IN EMPLOYMENT.

**STRENGTHS:** Based upon your overall evaluation of the City Manager, what areas would you list as her strong points as a manager?

ORGANIZATIONAL SKILLS.

**IMPROVEMENTS SUGGESTED:** Based upon your overall evaluation, what areas would you suggest the City Manager work on to improve her skills and to be even more effective? Please be as specific as possible.

WORK ON BEING MORE PERSONABLE. C.M. CAN BE A BIT "PRICKLY" AT TIMES.

Councilor Name: \_\_\_\_\_

Date: 7/1/16

Return to David Koch, City Attorney by Friday, June 24<sup>th</sup> 5:00 PM.

## **MANAGEMENT PERFORMANCE AND DEVELOPMENT APPRAISAL**

### **CITY OF McMinnville CITY MANAGER**

#### **PURPOSE**

In order to establish and maintain effective City Council and Manager Relationships, it is essential that the Council establish an ongoing evaluation process that offers an opportunity for each party to review the performance of the City Manager. This evaluation should focus on how effectively the City Manager is accomplishing the goals established by the City Council and how the City Manager is carrying out responsibilities in key performance areas including technical expertise as a City Manager, communications with staff, Council, and partners, and overall direction and operation of the City.

Specifically, the evaluation should serve the following needs:

1. Allow the City Manager and the Council to test, identify, and refine their respective roles, relationships, expectations of and responsibilities to each other.
2. Allow discussion of the City Manager's strengths and weaknesses as demonstrated by past performance with the objective of increasing the City Manager's effectiveness; that is, give the Council the opportunity to provide positive feedback in areas that have been handled well and to outline clearly areas where the City Manager could become even more effective through improved performance.

#### **PROCESS**

*The evaluation process shall occur annually in June, except that the Council may request an evaluation at any time during the year if need arises.*

1. Evaluation forms are distributed by the Mayor to all City Councilors and the City Manager.
2. Each Councilor and the City Manager complete the forms, sign them, and return one copy to the City Attorney who will forward all evaluations to the Mayor.
3. The Mayor tabulates the results of the Councilor evaluation forms.
4. Prior to the evaluation session, the City Manager will provide a memorandum to the Council including a self-evaluation using the same format and a summary of progress toward Council goals.
5. The Councilor composite evaluation and the City manager's self-evaluation are distributed to the Council by the Mayor prior to the executive session evaluation meeting. A copy of the Councilor composite evaluation is provided to the City Manager by the Mayor prior to the evaluation meeting.
6. The Council and Mayor meet with the City Manager in executive session (open session if requested by the City Manager) to jointly review the evaluation.

## **MANAGEMENT PERFORMANCE AND DEVELOPMENT APPRAISAL**

### **CITY OF McMinnville CITY MANAGER**

#### **INSTRUCTIONS**

Attached is the evaluation form for the City Manager. It encompasses three primary areas:

- 1) Evaluation of key performance areas;
- 2) Goals accomplishment;
- 3) General strengths and areas for improvement.

The rating system for the key performance areas is a somewhat subjective scale of excellent (EXC), good (GD), satisfactory (SAT), needs improvement (NI), unsatisfactory (UNS), and no observation (NO). A rating of excellent generally means that the City Manager consistently exceeds the expected level of performance. Good generally means that the City Manager consistently fulfills the requirements of the job and occasionally performs beyond expectations. Satisfactory performance means the City Manager normally fulfills the requirements of the job. Needs improvement means the City Manager generally meets the requirements of the job, but there may be one or more areas that the City Manager must work to correct to move forward. Unsatisfactory means the City Manager consistently fails to fulfill the requirements of the job.

A space to the right of each performance area has been included for individual comments. Each person preparing the form is encouraged to select a specific example or two of why, overall, a particular rating has been chosen. The comments included will give the City Manager enough information to correct problem areas and place a specific item on their work plan for the next year.

Upon completion of the form, please return it to the *City Attorney* who will forward to the Mayor for review and tabulation.

**NOTE:** Please sign the form prior to returning it to the City Attorney.

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
<b>I. Communications with Council</b>							
A) Timely and effective written communication with Council		X					
B) Timely and effective informal communication with Council		X					
C) Maintains close communications with Mayor			X				

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
<b>II. Implementation of Council Policy</b>							
A) Administers Council policy decisions consistent with Council intent		X					
B) Assists Council in development of goals and strategic planning	X						
C) Consults with Mayor and Council on Major issues that impact City Operations	X						

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
<b>III. Staff Support for Council</b>							
A) Anticipates issues which require Council involvement		X					
B) Provides clear, concise staff reports with alternatives and recommendations		X					
C) Provides Mayor and Council with input as requested at City Council Meetings and other City meetings.	X						
D) Shares leadership responsibilities with Council and Mayor		X					

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
<b>IV. Leadership</b>							
A) Provides organizational leadership	X						
B) City Manager exhibits							

confidence and respect for management teams involvement in decision making process.		X					
C) Recruits and hires staff involving Council or Council members on Management Team hires that have major impact on community relationships and partnerships.	X						
D) Evaluates staff regularly and fairly involving staff in evaluation process.		X					
E) Manager and staff maintain current knowledge of City issues	X						
F) Evaluates and adjusts City programs and relationships as necessary		X					
G) Develops professionalism	X						

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
<b>V. Financial Planning and Administration</b>							
A) Annual budget is prepared in timely manner providing Council with options for funding special programs and partner requests.	X						
B) Budget is well documented and organized to assist Council with policy decisions	X						
C) Effective administrative budget controls are in place	X						
D) Staff maintains a multi-year financial vision		X					

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
<b>VI. Personal and Professional Development</b>							
A) Keeps abreast of current City information and technology changes in municipal affairs		X					
B) Displays and practices effective oral and written communication skills	X						
C) Copes with adverse situations without impacting physical, mental, or emotional health of Council, management		X					

team, and staff.							
D) Uses personal skills (Judgment, diplomacy, imagination, etc.) to facilitate providing City services and implementing City projects and programs	X						

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
<b>VII. Delivery of City Services and Community Relations</b>							
A) Services meet the changing needs of McMinnville citizens and businesses.		X					
B) Services are delivered efficiently and effectively		X					
C) Manager is accessible to citizens			X				
D) Manager is open to suggestions from Council, staff, and public on improvements in services	X						
E) Maintains effective city news media relationships	X						
F) Disseminates accurate information about City issues		X					
G) Encourages public participation		X					
H) Generally maintains overall public confidence in City management	X						

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
<b>VII. Intergovernmental Relationships</b>							
A) Maintains and promotes effective communications with local, regional, State, and federal government agencies.		X					
B) Financial resources (grants) from other organizations are pursued where possible.	X						
C) Contributes to good government through participation in local, regional, and State committees & organizations	X						
D) Works constructively with other jurisdictions toward mutual goals		X					
E) Establishes effective, cooperative relationships with other public and private entities		X					

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

List specific examples if needed to explain remarks provided.



**ACCOMPLISHMENTS:** Has the City Manager effectively accomplished or worked towards accomplishing the goals established by the City Council? Why or why not?

Yes - she has done a great job of integrating Council goals with staff and resources available.

**STRENGTHS:** Based upon your overall evaluation of the City Manager, what areas would you list as her strong points as a manager?

a strong "let's get some action going" leader  
very good at researching out what is ahead.

**IMPROVEMENTS SUGGESTED:** Based upon your overall evaluation, what areas would you suggest the City Manager work on to improve her skills and to be even more effective? Please be as specific as possible.

I don't have a lot of interaction with her outside meetings but I would hope to see her becoming (with time) more integrated with business leaders. Making our citizens comfortable with her to establish and maintain the trust factor so needed.

Councilor Name: \_\_\_\_\_

Date: \_\_\_\_\_

6-28-16

**Return to David Koch, City Attorney by Friday, June 24<sup>th</sup> 5:00 PM.**

I know it is late but I did actually  
return it !!

## **MANAGEMENT PERFORMANCE AND DEVELOPMENT APPRAISAL**

### **CITY OF McMinnville CITY MANAGER**

#### **PURPOSE**

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6. The Council and Mayor meet with the City Manager in executive session (open session if requested by the City Manager) to jointly review the evaluation.

## MANAGEMENT PERFORMANCE AND DEVELOPMENT APPRAISAL

### CITY OF McMinnville CITY MANAGER

#### INSTRUCTIONS

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Upon completion of the form, please return it to the **City Attorney** who will forward to the Mayor for review and tabulation.

**NOTE:** *Please sign the form prior to returning it to the City Attorney.*

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
<b>I. Communications with Council</b>		X					
A) Timely and effective written communication with Council		X					Regular updates on upcoming issues
B) Timely and effective informal communication with Council		X					Good engagement with Scott, Kellie and Remy as the budget and various boards engender communication; I need to work on developing informal communication with the remaining three Council members as I rarely catch them outside of Council sessions
C) Maintains close communications with Mayor		X					Communication over the last few months has slowed down but it's still good

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
<b>II. Implementation of Council Policy</b>							
A) Administers Council policy decisions consistent with Council intent		X					Moved affordable housing & airport issues ahead, resolved IT and brought on a new Planning Director with Economic Development expertise. Transportation and other projects ongoing with no issues.
B) Assists Council in development of goals and strategic planning			X				Still need to resolve how Council wants to move forward without Sue's input
C) Consults with Mayor and Council on Major issues that impact City Operations		X					

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
<b>III. Staff Support for Council</b>							
A) Anticipates issues which require Council involvement		X					
B) Provides clear, concise staff reports with alternatives and recommendations		X					Would like to clean up the Council Packets as we bring on the full time City Recorder and work on moving the publish date back one day to Tuesday to allow more time for Councilor review and to allow the NR some time to ask follow on questions prior to their own deadlines
C) Provides Mayor and Council with input as requested at City Council Meetings and other City meetings.		X					
D) Shares leadership responsibilities with Council and Mayor		X					

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
<b>IV. Leadership</b>							
A) Provides organizational leadership	X						Worked with management team to find weakest spots and to work paths forward. Energizing Long term planning, bringing back capacity to public works and driving into reviews with Fire / Police; would like to be further along with municipal code and contract review.
B) City Manager exhibits confidence and respect for management teams involvement in decision making process.	X						Working very hard in ensuring each Department Head has latitude to run their departments with the expertise they bring to the table and to ensure ideas generate with them.
C) Recruits and hires staff involving Council or Council members on Management Team hires that have major impact on community relationships and partnerships.	X						
D) Evaluates staff regularly and fairly involving staff in evaluation process.		X					You can never do this well enough
E) Manager and staff maintain current knowledge of City issues		X					Need to continue to focus on getting out more with Employees / Citizens
F) Evaluates and adjusts City programs and relationships as necessary	X						
G) Develops professionalism		X					Would like to develop more employees purposefully but still have a ways to go before we have a strong program. More ad hoc and in the work centers primarily.

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
<b>V. Financial Planning and Administration</b>							
A) Annual budget is prepared in timely manner providing Council with options for funding special programs and partner requests.	X						This is all Marcia and Ronda keeping me on track!
B) Budget is well documented and organized to assist Council with policy decisions	X						
C) Effective administrative budget controls are in place	X						
D) Staff maintains a multi-year financial vision		X					We need to continue to focus on this and in conjunction with long term Council objectives

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
<b>VI. Personal and Professional Development</b>							
A) Keeps abreast of current City information and technology changes in municipal affairs		X					
B) Displays and practices effective oral and written communication skills							
C) Copes with adverse situations without impacting physical, mental, or emotional health of Council, management team, and staff.			X				I think I'm wearing the Council down at times with the long sessions. We need to discuss how to get out of this as I don't see the tempo slowing down in the near future.
D) Uses personal skills (Judgment, diplomacy, imagination, etc.) to facilitate providing City services and implementing City projects and programs		X					Diplomacy entails a level of patience which I'll need to work on forever

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
<b>VII. Delivery of City Services and Community Relations</b>							
A) Services meet the changing needs of McMinnville citizens and businesses.			X				I haven't really been here long enough to effect a change in service; Visit McMinnville and Urban Renewal were already underway.
B) Services are delivered efficiently and effectively			X				Services are delivered the best we can right now but several areas are lacking
C) Manager is accessible to citizens	X						
D) Manager is open to suggestions from Council, staff, and public on improvements in services			X				I sometimes get frustrated with some ideas and I'm sure it shows
E) Maintains effective city news media relationships			X				
F) Disseminates accurate information about City issues		X					
G) Encourages public participation		X					
H) Generally maintains overall public confidence in City management		X					

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

KEY PERFORMANCE AREAS	EXC	GD	SAT	NI	UNS	NO	COMMENTS
<b>VII. Intergovernmental Relationships</b>	X						
A) Maintains and promotes effective communications with local, regional, State, and federal government agencies.							
B) Financial resources (grants) from other organizations are pursued where possible.			X				I would really like to drive into this as I believe there are grant dollars we are not pursuing
C) Contributes to good government through participation in local, regional, and State committees & organizations	X						Oregon Aviation Board Member; LOC energy / transportation board member; CIS trustee
D) Works constructively with other jurisdictions toward mutual goals		X					Ex: Initial stages of partnerships for Fire
E) Establishes effective, cooperative relationships with other public and private entities		X					

Excellent (EXC), Good (GD), Satisfactory (SAT), Needs Improvement (NI), Unsatisfactory (UNS), and No Observation (NO)

**List specific examples if needed to explain remarks provided.**

**ACCOMPLISHMENTS:** Has the City Manager effectively accomplished or worked towards accomplishing the goals established by the City Council? Why or why not?

**STRENGTHS:** Based upon your overall evaluation of the City Manager, what areas would you list as her strong points as a manager?

**IMPROVEMENTS SUGGESTED:** Based upon your overall evaluation, what areas would you suggest the City Manager work on to improve her skills and to be even more effective? Please be as specific as possible.

Councilor Name: \_\_\_\_\_ Date: \_\_\_\_\_

**Return to David Koch, City Attorney by Friday, June 24<sup>th</sup> 5:00 PM.**