



A place where families and businesses thrive.

CITY RECORDER USE ONLY:

AGENDA ITEM #: _____

MEETING DATE: 04/11/2022

FINAL ACTION: WORK SESSION

CITY COUNCIL STAFF REPORT

TO: Mayor and City Councilors

FROM: Paul Downey, Assistant City Manager/Finance Director
Anna D. Ruggles, City Recorder

MEETING DATE: April 11, 2022

SUBJECT TITLE: City Manager's Performance Review Criteria & Process

ACTION REQUESTED:

☐ Ordinance

☐ Order

☐ Resolution

☐ Motion

☒ X

☐ Informational

X all that apply

ISSUE: Pursuant to City Manager's Employment Agreement, Section 6, Performance Review, the City Council must annually evaluate the City Manager's performance. Pursuant to ORS public meeting laws:

- The evaluation criteria and policy directives must be adopted in a meeting open to the public in which the public has had the opportunity to comment.
- The Council may hold an executive session "to review and evaluate" the performance of the City Manager.
- The Council may not discuss salary in executive session in connection with the job performance evaluation.
- The Council may not use an executive session "to conduct a general evaluation of goals, objectives, operations or programs."
- The City Manager may request an open hearing for the performance evaluation with advance notice.

The evaluation of the City Manager serves two purposes: to evaluate the performance of the City Manager, and to act as a communication bridge for the Mayor, Councilors and the City Manager. The Council evaluates the City Manager on: Performance standards; Council relations; technical knowledge; problem solving and decision making; external relations; fiscal management; and personnel management and supervision, and Council's future expectations.

BACKGROUND: The purpose of this work session is to consider the City Manager Performance Review Criteria and Process. The following step-by-step process occurs:

1. Resolution Approving City Manager Performance Review Criteria and Process. Once approved:
 - a. A letter on behalf of the Council is sent to Department Directors requesting comments on the City Manager's performance. Directors may provide input with an option to remain confidential. Directors submit input directly to City Attorney who will prohibit

disclosure of information submitted in confidence as provided by ORS 192.355(4). City Attorney compiles submitted comments into a single document and distributes results in a sealed envelope or by confidential e-mail directly to Council.

- b. Council directs City Manager to prepare a self-evaluation.
 - c. Each Councilmember is e-mailed a City Manager Performance Review appraisal to complete.
2. Executive Session 1: City Manager presents self-evaluation to Council.
 3. Each Councilmember submits their completed performance appraisal directly to the Mayor. Mayor and Council President tabulate and summarize the results of the performance appraisals.
 4. Executive Session 2: Council reviews the results of the finalized performance appraisal with the City Manager.
 5. Executive Session 3: Is held if needed for Council to finalize performance appraisal with City Manager.
 6. Council returns to regular Council meeting in accordance with state law. Mayor gives a summary of the City Manager's performance appraisal. At this time, the Council can discuss authorizing compensation. The Council considers the following action items:
 - Resolution Accepting City Manager's Performance Review
 - Resolution Authorizing City Manager's Compensation for Fiscal Year 2022-23

STAFF RECOMMENDATION: Informational Work Session. If Council concurs at the work session, staff will proceed at the next regular Council meeting to adopt the City Manager Performance Review Criteria and Process as outlined the Attachments.

ATTACHMENTS:

Attachment A: City Manager Performance Review & Proposed Target Dates

Attachment B: Draft Memorandum to Department Directors

Attachment C: City Manager Performance Review appraisal form



A place where families and businesses thrive.

City Manager Performance Review & Proposed Completion Dates:

Pursuant to City Manager's Employment Agreement, the City Council must annually evaluate the City Manager's performance and authorize compensation.

Monday, April 11	Council Work Session: City Manager Performance Review Criteria
Monday, May 9	1) Resolution Approving City Manager Performance Review Criteria and Process. Upon approval: - A letter on behalf of the Council is sent to Department Directors requesting comments on City Manager's performance; - Council directs City Manager to prepare a self-evaluation; and - Each Councilmember is e-mailed a performance review appraisal form to complete.
Friday, May 20	Department Directors deadline to submit comments to City Attorney
Monday, May 23	City Attorney (third-party) deadline to submit directly to Council compilation of Department Directors comments in a sealed envelope or by confidential e-mail
Monday, May 23	2) First Council Executive Session under ORS192.660(2.1.) is held to review: City Manager's Self-Evaluation
Friday, June 10	3) Councilmembers deadline to submit directly to Mayor their performance review forms: Mayor and Council President tabulate and summarize the results of the performance appraisals
Monday, June 27	4) Second Council Executive Session under ORS192.660(2.1.) is held to review: Performance appraisal review with City Manager
Monday, July 11	5) Third Council Executive Session under ORS192.660(2.1.) is held, if necessary, to: Finalize performance appraisal with City Manager
Monday, July 11	6) Council returns to regular Council meeting and in accordance: The Mayor gives a summary of the City Manager's performance appraisal. At this time, the Council discusses authorizing compensation and, if applicable, vehicle allowance for FY2022-23, and Council considers the following action items: ▪ Resolution Accepting City Manager's Performance Review ▪ Resolution Authorizing City Manager's Compensation for FY2022-23

Councilor Name: _____

CITY MANAGER PERFORMANCE REVIEW

Instructions:

This evaluation has two parts. Part I involves an evaluation of the annual performance of the City Manager during the evaluation period of **JULY 1, 2021, TO CURRENT**. Part II concerns your expectations and goals for the City Manager during the coming year. In evaluating the Manager's past performance, you are asked to rate that conduct according to the following categories:

- | | | | |
|-----|----|---|-------------------|
| (1) | NI | = | Needs Improvement |
| (2) | M | = | Meets Standards |
| (3) | E | = | Exceeds Standards |
| | NO | = | Not observed |

Following each performance standard, please provide any appropriate comments in that area.

Part I. Performance Standards

1. Personal Traits / Professionalism

NI	M	E	NO

Positive attitude, self-motivating; self-confident; creative; uses common sense; professional and personal integrity; emotional stability; takes initiative; receptive to new ideas and changes; maturity in relations with others; prepares quality products; willingness to seek personal growth and development; takes consistent position with different audiences; adherence to high professional ethical standards; exercises diplomacy; demonstrates high personal integrity.

Comments:

2. City Council Relationships

NI	M	E	NO

Effectively implements policies and programs approved by City Council; reporting to City Council is timely, clear, concise, and thorough; accepts direction or instructions in a positive manner; effectively aids the City Council in establishing long-range goals; keeps Council informed of current plans and activities of administration and new development; sensitive to and perceptive of Council needs and desires; maintains a relationship of trust with each Council member and the Mayor; available to members of the Council; properly orients new Council members.

Comments:

3. Technical Knowledge and Use

NI	M	E	NO

General overall knowledge of city operations and responsibilities; willing and able to learn; keeps current on professional issues, trends, techniques, and methods of operation; keeps current on legislation, funding opportunities and regulations; administrative knowledge (budget, personnel, grants, and purchasing rules and regulations); knowledge of city developments in public policy.

Comments:

4. Problem Solving and Decision Making:

NI	M	E	NO

Anticipates problems; identifies problems, issues and concerns; ability to analyze problems (to honestly identify and assess alternatives); develops and recommends creative, innovative and realistic solutions and implements and refines such solutions; considers alternatives and available facts before making decisions; resolves problems at lowest possible level (takes responsibility for decisions); gets affected parties involved in problem solving; reaches timely decisions; flexibility and receptiveness to suggestions; resolves problems under strained and unpleasant conditions; achieves goals set by or in conjunction with City Council; consults with Council when appropriate.

Comments:

5. External Relations

NI	M	E	NO

Projects positive public image; effectively handles citizens' complaints and inquiries; educates public on city problems, programs and operations; keeps commitments to the public; maintains contact/liaison with community groups; maintains effective intergovernmental relations; maintains effective relations with media representatives.

Comments:

6. Fiscal Management

NI	M	E	NO

Prepares realistic annual budgets; seeks efficiency, economy and effectiveness in all programs; controls expenditures in accordance with approved budgets; keeps City Council informed about revenues and expenditures, actual and projected; is cost effective; assures that Budget Committee is well informed of short and long-term City financial status; involves Council in fiscal affairs.

Comments:

7. Personnel Management & Supervision

NI	M	E	NO

Maintains adequate levels of supervisions and internal control and communication; employees are given necessary guidance regarding responsibilities and tasks; follow-up is initiated to properly account for employee activities; disciplinary matters and corrective actions are appropriate and applied in a timely fashion. Management atmosphere encourages professional growth; encourages initiative and creativity; allows subordinates to grow professionally.

Comments:

Part II. Future Expectations

- 1. What objectives should the City Council set for the City Manager for the coming year?**

DRAFT



A place where families and businesses thrive.

ATTACHMENT: B

CITY COUNCIL MEMORANDUM

TO: *Department Directors*

FROM: *City Council*

PROJECT TEAM: *Anna D. Ruggles, CMC, City Recorder*

DATE: *May 09, 2022*

SUBJECT TITLE: *City Manager's Performance Review*

The City Council approved the City Manager's evaluation performance standards and criteria, and as part of the evaluation process, the Council is seeking Department Director input on the performance appraisal of the City Manager for the evaluation period of July 1, 2021, to current. The Council's goal is to establish a thoughtful and considered process that also expedites the City Manager's evaluation. The Council recognizes the importance of giving Department Directors an option to remain confidential. To achieve this, the Council has named City Attorney, as a third-party person, who will keep your name confidential upon your request. The City Attorney will remove the name of the evaluator, unless the evaluator waives the promise of confidentiality. Information submitted in confidence is exempt from public disclosure under ORS 192.355(4).

The Council encourages you to submit your input **no later than Friday, May 20, 2022**, directly to City Attorney, preferably by e-mail at: [Ashley Driscoll \[AshleyD@gov-law.com\]](mailto:AshleyD@gov-law.com). If submitting comments by e-mail and you wish to remain anonymous, please advise the City Attorney of your desire to remain anonymous.

The City Attorney will compile the submitted comments into a single document and distribute sealed to the Council **no later than Monday, May 23, 2022**. The Council will review comments with City Manager in executive session unless City Manager requests an open hearing.

Thank you for your sincere consideration of the above request.