

City Council Study Session

Monday, March 16, 2026 at 6:00 PM

27400 Southfield Road, Lathrup Village, Michigan 48076

1. **Call to Order** by Mayor Kantor
2. **Discussion Items**
 - A. Master Plan Update
 - B. Council Rules of Order & Procedure - Video/Audio Recording
 - C. City Administrator Evaluation
 - D. Regular Meeting Agenda Items
3. **Public Comments**
4. **Mayor and Council Comments**
5. **Adjourn**

6. **ADDRESSING THE CITY COUNCIL**

Your comments shall be made during the times set aside for that purpose.

Stand or raise a hand to indicate that you wish to speak.

When recognized, state your name and direct your comments and/or questions to any City official in attendance.

Each person wishing to address the City Council and/or attending officials shall be afforded one opportunity of up to three (3) minutes during the first and last occasion for citizen comments and questions and one opportunity of up to three (3) minutes during each public hearing.

Comments made during public hearings shall be relevant to the subject of the public hearings being held.

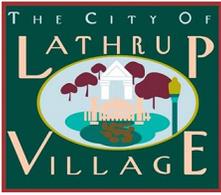
In addition to the opportunities described above, a citizen may respond to questions posed to them by the Mayor or members of the Council, provided members have been granted the floor to pose such questions.

No speakers may make personal or impertinent attacks upon any officer, employee, City Council member, or other elected Official that is unrelated to how the officer, employee, or City Council member or other Elected Official performs their duties.

No person shall use abusive or threatening language toward any individual when addressing the City Council.

Attendees are permitted to make video and sound recordings of the public meeting. However, video recording devices shall only be permitted in a designated area, and the device shall remain there through the duration of the meeting.

The Mayor shall direct any person who violates this section to be orderly and silent. If a person addressing the Council refuses to become silent when so directed, such person may be deemed by the Mayor to have committed a "breach of the peace" by disrupting and impeding the orderly conduct of the public meeting of the City Council and may be ordered by the Mayor to leave the meeting. If the person refuses to leave as directed, the Mayor may direct any law enforcement officer who is present to escort the violator from the meeting.



City of Lathrup Village
27400 Southfield Road
Lathrup Village, MI 48076
www.lathrupvillage.org | (248) 557-2600

TO: Mayor & City Council
FROM: Mike Greene – City Administrator
DATE: March 16, 2026
RE: Study Session

Master Plan Update

During the February 23 Study Session, it was requested by Councilmember Sousanis to have this topic included in an upcoming Study Session to discuss questions regarding the Master Plan process. Giffels Webster had a prior commitment and is unable to attend the March 16 Study Session, but they have provided written responses to the questions Councilmembers shared with administration.

While the Master Plan update process is overseen by the Planning Commission, as provided in the Michigan Planning Enabling Act, the City will have a portion of the upcoming Planning Commission meeting dedicated to Council feedback if any Councilmember wishes to attend the meeting and provide comments at this stage in the process.

Council Rules of Order & Procedure – Video/Audio Recording

This topic was requested by Councilmember Sousanis for the Council to have a discussion regarding Section 25 – *Video/Audio recording during a public meeting* of the approved Council Rules of Order & Procedure.

City Administrator Evaluation

While this City Council is great at providing feedback year-round, the City Council is respectfully requested to begin conducting the annual performance evaluation of the City Administrator in accordance with the terms of the Administrator’s employment agreement. Completing this evaluation is important for the Administrator’s compensation, and a potential wage adjustment/bonus is tied to the review results.

Additionally, during the last review cycle, the City Council discussed reworking the evaluation form/process. If the Council continues to wish to do so, now would be the time.

Included in the packet is the template used last year, an evaluation guide from the International City/Council Managers Association (ICMA), and an example template from ICMA.

Regular Meeting Agenda Items

Holding spot for general questions related to items on the regular meeting agenda.

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|------------------------------|---------------------------------------|---|--|--|
| Bruce Kantor Mayor | Kelly Garrett Mayor Pro-Tem | Jalen Jennings Council Member | Jason Hammond Council Member | John Sousanis Council Member |
|------------------------------|---------------------------------------|---|--|--|

Comprehensive Plan – March 2026 Council Questions

Prepared by Giffels Webster

How is resident participation to date being evaluated in terms of depth and representativeness, and how it will inform the next phase of planning?

Resident input is essential for the Master Plan to help set the long-range vision and goals for the city. This input, combined with existing conditions data and projections for the future, will be considered by the Planning Commission in their development of the plan.

The planning process, outlined in our 2025 scope of work, includes multiple opportunities for engagement and input. These opportunities include topical surveys (housing, transportation, economic development, and parks, recreation, and sustainability), discussions at Planning Commission study sessions, public comment at Planning Commission regular meetings, a community open house, and a public hearing. These online and in-person opportunities allow residents (and businesses) to participate at their convenience and at a level that is meaningful to them.

To raise awareness of these opportunities, our team supports City staff and officials through the creation of a project website, topical survey flyers, and business cards with the link to the website. Additionally, we offer staff some text that is helpful for social media promotion.

The use of “planning neighborhoods,” five geographic sections of the city based on the street network, allow the Planning Commission to gauge how representative engagement is throughout the city. Each of the topical surveys includes a question that asks respondents in which neighborhood they live. It appears that so far, at least with the housing topic, residents living in the neighborhoods south of I-696 are underrepresented in the survey responses. Knowing this, the Planning Commission may wish to consider how to increase participation in the southern neighborhoods. Strategies could include personal invitations to contribute to the surveys and attend meetings.

Following the topical surveys and discussions, the Planning Commission will consider the feedback and assess what more they need to know in order to update the Master Plan. These questions will be incorporated into the open house activity. Generally, the open house will feature stations by topic (housing, transportation, economic development, and parks, recreation, and sustainability), and we expect the Planning Commissioners to assist with staffing these stations and having a dialogue with participants. Similar information will be presented on the project website, allowing more opportunities to engage with residents should they be unable to join in person.

With all this information collected, the Planning Commission will revisit the goals, objectives, and action items from the 2021 Master Plan and consider refinements that may be necessary. The big picture is that the City is largely built out – with the existing single-family neighborhoods comprising a significant portion of the City – the primary areas that could change or be modified are along Southfield Road and the mile roads. Those non-single-family residential areas are restricted by their relatively small lot sizes and right-of-way constraints. The Planning Commission will be thinking creatively and responsively about redevelopment that stimulates economic development in ways that respect the City’s residential neighborhoods.

How are housing and land use discussions being calibrated to Lathrup Village’s existing development and realistic capacity (especially in the neighborhoods)?

As noted above, the City is largely built out. While there are opportunities for redevelopment in the commercial corridors, the Planning Commission, in the City’s 2009, 2015, and 2021 Master Plans, has been consistent about maintaining the charm and character of the historic single-family residential neighborhoods while also ensuring homes meet the needs of residents today and in the future. In the last

Master Plan, which guided a subsequent zoning amendment, housing units in the form of townhomes and/or apartments were added to the Southfield Road corridor. A small “cottage court” concept was also included for the “house in the woods” property. This concept envisioned smaller homes clustered around a common open space. While this opportunity no longer exists, the concept shows the Planning Commission (in 2021) identifying an opportunity to add to the housing stock in a way that was compatible with the surrounding neighborhood.

In Lathrup Village, the housing stock, while charming and historic, is aging, and the Planning Commission has identified this as a concern for residents today and in the future. Strategies to support needed upgrades to homes, while maintaining the historic character of the neighborhoods, will be explored as the Planning Commission moves through the Master Plan process.

As in 2021, the Master Plan will likely look to Southfield Road and mile roads for both ways to encourage economic vitality as well as provide housing needs for Lathrup Village residents. Continuing to explore housing, goods, and services, while supporting local businesses, will be topics for upcoming discussions with the Planning Commission and the community.

How are peer city comparisons and regional data being used to frame issues, and how our specific local conditions are reflected in that analysis?

So far in the planning process, the Planning Commission has discussed demographic data in surrounding/local communities. The area comparison data is not intended to underscore differences or disparities between communities, but rather to illustrate and better understand how Lathrup Village fits into the broader regional context. While not necessarily “peer cities,” these are communities with which people are familiar with and that share a common geographical context as part of the larger southeast Michigan region. This is helpful in providing context and understanding to data, which can feel abstract. These communities share a transportation network and people travel into and out of them, often without realizing where one municipal boundary separates another. This means that Lathrup Village does not plan in a vacuum; and indeed, there are some things that residents find elsewhere – like the library, larger natural areas, and regional shopping. The Planning Commission will discuss the local needs of the City, based on both data and community input. which include residents as well as business owners, to strive for a long-range plan that is practical, realistic, and forward-thinking.

How will the housing, economic development, and transportation be integrated as recommendations begin to take form?

Through the City’s previous plans, and through the current planning process, the comprehensive nature of these community elements is reinforced. One cannot discuss housing without also talking about transportation as they are the two biggest expenses households face. Likewise, maintaining quality neighborhoods cannot be discussed without recognizing the importance of strengthening the City’s economic base. The latter half of the project will allow the Planning Commission to revisit each of the focus areas and better understand how they are woven together.

What structured checkpoints remain for Planning Commission and Council to help shape direction before draft recommendations are developed?

The development of the Master Plan is a Planning Commission responsibility, as provided in the Michigan Planning Enabling Act. Their expert knowledge as residents and understanding of development in the City helps them see how planning today results in future development. They have a number of meetings ahead in which to review and understand data and community input, assess goals and objectives, and

develop implementation strategies. While the scope was developed consistent with previous planning efforts (where City Council was engaged at the beginning to provide high level feedback), if an additional joint meeting is desired, that might fit well when the Planning Commission has a working draft prepared (likely Fall 2026).

What role does the theoretical Southfield BLVD still play in their planning, as sentiment from Council and others seems to be moving away from that as a long term goal?

The Planning Commission will be studying transportation at their March regular meeting and at their April study session. In April, a transportation planner with the Road Commission for Oakland County will be attending to respond to any transportation questions that arise in the March meeting. It will be important to understand the issues surrounding the boulevard concept, which has been in the planning phase for almost 20 years. From a Master Plan standpoint, the long-range plans for the City should support mobility into and out of all four quadrants of the City by multiple modes. Key elements of the previous plans have included strategies to reinforce safe pedestrian/bicycle travel, and support economic vitality in the corridor by providing flexibility with parking and permitted uses.

Without further direction from City Council, the Planning Commission will be moving forward with implementation strategies that respond to the planned boulevard. Changing the RCOC's plan for Southfield Road should be a conversation that City Council should have with the RCOC and the City of Southfield so as not to present unintended consequences to neighboring communities and the regional transportation corridor. If that is something that City Council intends to do, perhaps there should be an initial conversation at a high level (between the City Administrator and the RCOC transportation planner) to understand the best approach. It will be important for City Council to be clear on the purpose and need for the change so that all the stakeholders are able to respond in the most meaningful manner.

STANDING RESOLUTION NO. 2025-05

COUNCIL RULES OF ORDER AND PROCEDURE

The Lathrup Village City Council meeting is dedicated to the premise that government has a responsibility to the residents of the City and to the media to conduct a well-organized and objective meeting and an obligation to keep them informed. Council meetings should be attractive, interesting and understandable to all in attendance with as much opportunity for audience participation as is possible. Accordingly, the following Rules of Order and Procedure are adopted:

1. Definitions

- A. "Breach of the peace," shall mean seriously disruptive conduct involving abusive, disorderly, dangerous, aggressive, or provocative speech and behaviors tending to threaten or incite violence. "Breach of the peace" goes well beyond behavior acceptable in a civil society and is the only basis to eject, exclude or prevent a participant from attending all or part of a public body meeting.
- B. "Meetings" shall mean all regular meetings, study sessions and all other public hearings of Lathrup Village "public bodies," as defined under the Open Meetings Act, MCL 15.261 et seq. (OMA), including the Lathrup Village City Council.
- C. "Participant" shall mean any person attending and/or addressing the public body at a meeting during public comment but does not include elected public officials.
- D. "Public comment" shall mean the audience communication period(s) prescribed in this ordinance or the approved by way of agenda of a meeting that is intended for members of the public to address a Lathrup Village public body in compliance with the OMA. MCL 15.263(5).
- E. "Out of order," shall mean verbal and/or nonverbal conduct by a participant disrupts the orderly administration of a meeting including but not limited to the interruption of the efficient Order of Business, violation of state or local ordinance at a meeting, use of profanity, shouting, verbal threats of physical violence, or other acts of indecorum.

2. Regular Council Meetings

The Council shall set a regular schedule for its meeting dates (February through January of the following year) as a part of the agenda at its organizational meeting (first meeting in January). The place and time of the meeting shall be decided by the Mayor and shall be included in the agenda calling for the meeting.

3. Special Meetings

According to Section 6.2 of the Charter, special meetings shall be called by the Clerk on the written request of the Mayor, the City Administrator or any two members of the Council on at least 24 hours written notice to each member of the Council, e-mail notice is sufficient; but a special meeting may be held on shorter notice if all members of the Council are present or have waived notice thereof in writing.

The City Clerk will also make a diligent effort to notify each member of the Council in person of each special session. At such a meeting only the matters in the notice shall be acted upon.

4. Recessed Meetings

Any session of the Council may be continued to another day, but no such continuation shall be for a longer period than until the next regular meeting thereafter.

5. Study Meetings

A study meeting may be convened on call by the Mayor or by two or more members of the Council. All members of the Council must be notified of the time and place of the meeting as in Rule # 2. Attendance at study meetings and notices calling such meetings shall be in harmony with the provisions of the Michigan Open Meetings Act.

The call for the meeting may also invite such people as may be required for consultation and advice with respect to the matters under discussion. At a study meeting no formal votes may be taken on any matter under discussion nor shall any Council members enter into a commitment with another respecting a vote to be taken subsequently at a public meeting of the Council. All study meetings shall be called by the Mayor at regular Council meetings. A brief confirmation of the time and date may be held at the meeting and all study meetings will be attempted to be held on Monday nights between regular Council dates.

6. Council Meeting Agenda

The agenda for all council and study meetings shall be prepared by the Mayor and/or Mayor Pro-Tem with the assistance of the City Administrator. The City Clerk shall furnish a copy to each member of the Council, the City Administrator, the City Attorney, and all other citizens who are involved in the meeting such as the Chairperson of Advisory Committees or other functions, on the Friday evening of the week preceding the meeting. All reports, communications, ordinances, resolutions, contract documents or other materials to be submitted to the Council shall be delivered to the members of the Council, the City Administrator and the City Attorney by the City Clerk as early as possible but no later than Friday evening.

7. Official Reports

Wherever possible, reports by the City Administrator, City Attorney, Police Department, City Clerk, Advisory Boards and Committees will be made in writing to the Council, submitted prior to the meeting and listed on the agenda. Under such procedure, discussion at an open council meeting will be limited to general questions from the audience or the Council on the subject matter of these reports. Concluding action may be taken at this time. Items re-quiring action by request of the City Administrator or City Attorney will be listed as regular agenda items and, unless conditions make it impossible, will be submitted to members of the Council with the agenda for the meeting. Copies of other reports will be distributed to the Council for their infor-mation.

8. Correspondence

The City Administrator and the Mayor are delegated the responsibility of handling all correspondence. Under this system only those correspondence which necessarily requires Council decision on policy will be brought before the council meeting. Copies of other correspondence may be distributed to the Council for their information.

Correspondence received by all Council Members via e-mail which require council decision on Policy shall be acknowledged and responded to by the Mayor within a reasonable time frame; the correspondence shall then be transmitted to the City Administrator for inclusion on the agenda of the next regular meeting.

Correspondence received by individual Council Members via e-mail which require council decision on Policy shall be forwarded to the Mayor for acknowledgement and response within a reasonable time frame; the correspondence shall then be transmitted to the City Administrator for inclusion on the agenda of the next regular meeting.

Correspondence received by all Council Members via e-mail which does not require council decision on Policy shall be acknowledged and responded to by the Mayor within a reasonable time frame; the correspondence shall then be transmitted to the City Administrator for follow-up and if necessary, action.

Correspondence received by individual Council Members via e-mail which does not require council decision on Policy shall be acknowledged and responded to within a reasonable time frame; the correspondence shall then be transmitted to the City Administrator for follow-up and if necessary, action.

Correspondence from any Council Member to the City Administrator shall also cc the Mayor as part of that communication.

9. Attendance at Conferences

The selection of the City's representative at conferences and meetings with outside organizations and officials, where official designation is required, is delegated to the Mayor, with concurrence of Council if substantial expense is involved.

Newly elected officials shall be required to attend the ‘Newly Elected’ training offered through the Michigan Municipal League within the first six (6) months of being sworn in.

10. Presiding Officer

The Mayor shall take the chair at the time appointed for the Council to meet and call the members to order. The Role will be noted by the Mayor and recorded by the Clerk for the minutes. The Mayor Pro-tem shall take the chair as presiding officer in the absence of the Mayor.

11. Temporary Chairperson

In case of absence of the Mayor and Mayor Pro-tem, the Clerk shall call the Council to order and call the roll. If a quorum is found to be present, the Clerk shall appoint a Chairperson to act until the Mayor or Mayor Pro-Tem appears.

12. Council Privileges

The presiding officer may move, second, and debate from the chair, subject only to such limitations on debate as are by these rules imposed on all members and shall not be deprived of any of the rights and privileges of a Council member by reason of his/her acting as the presiding officer.

13. Decorum and Order

Meetings are to be formal with the enforcement of stringent rules for debate which will control the expenditure of valuable time. The presiding officer shall preserve decorum and decide all questions of order, subject to formal appeal to the Council as a whole.

Every person desiring to speak shall address the chair and shall wait to be recognized by the chair. T h e y shall then confine himself/herself to the question under debate. Every Council member desiring to question the administrative staff shall address their questions to the City Administrator, who may either answer the inquiries or designate some member of staff for that purpose. A Council member, once recognized, shall not be interrupted while speaking unless a point of order is raised.

14. Quorum

The majority of the Council members elected shall constitute a quorum. In the case that a lesser number than a quorum shall convene at a regular or special meeting, the majority of the members present may send for any or all absent members by agreement. In the event a quorum cannot be obtained, the meeting must be adjourned. It is the duty of each Council member to notify the Mayor or Administrator if he/she cannot attend any Council meeting a minimum of 2 hours prior to the start of the meeting. A Council member who has provided

timely notice shall be excused from attendance. A Council member that fails to provide timely notification shall not be excused. Any member of Council that fails to provide timely notice of absence may, at the next regular meeting, present an explanation of absence and if warranted may have their absence excused.

15. City Administrator

The City Administrator shall attend all meetings of the Council unless excused by the Mayor. He/she shall keep the Council fully advised as to the needs of the City and make recommendations to the Council; they may take part in discussions on all matters concerning the welfare of the City and shall have a seat but no vote in the Council meetings.

16. City Clerk

The City Clerk shall be the Clerk for the City Council and shall attend all regular and special Council meetings unless excused by the Administrator, wherein the Administrator shall provide for the recording of minutes. The Clerk shall be responsible for keeping the minutes of the meetings and shall perform such other duties in the meeting as may be in order. Within one week after the meeting, the Clerk shall make available upon request a copy of the minutes of the preceding meeting. Each member shall be furnished a copy of the preceding meeting minutes no later than the next regular meeting.

17. City Attorney

The City Attorney shall attend all regular and special meetings of the Council unless excused by the Mayor. Any member of the Council may at any time call upon the City Attorney for an oral or written opinion concerning routine questions of law with respect to the City which do not require extensive research.

18. Right of Appeal

Any Council member may appeal to the full Council from a ruling of the Presiding Officer. If the appeal is seconded, the Presiding Officer shall immediately put the question of sustaining the decision of the chair to a vote.

19. Voting

Every Council member present when an ordinance or resolution is put to a vote shall vote, whether "yes" or "no", on a question during roll call. The only exception to this requirement for voting shall be in the case of a con-flict of interest which shall preclude a Council member from voting.

20. Personal Privilege

The right of a Council member to address the Council on a question of personal privilege in cases where his integrity or motives are questioned, shall be given preference over other discussions. Any member shall have the right to express dissent against any ordinance or resolution of the Council and have the reason therefore entered upon the official minutes, and whenever possible shall present to the City Clerk his expression in written form for the official records.

21. Code of Ethics

City Council members occupy positions of public trust. All business transactions of such officials dealing in any manner with public funds, either directly or indirectly, must be subject to the scrutiny of public opinion both as to the legality and to the propriety of such transactions. Council members shall not have a pecuniary interest either directly or indirectly in contracts of any character with the City, unless fully and publicly disclosed to the full Council and handled in accordance with proper legal procedures.

Council members shall conduct themselves so as to bring credit upon the City as a whole and so as to set an example of good ethical conduct for all citizens of the community. Council members shall always bear in mind their responsibility to the entire electorate, shall refrain from actions benefiting special interest groups at the expense of the City as a whole, and shall do everything in their power to ensure equal and impartial law enforcement throughout the City at large.

Council members shall conduct themselves in accordance with City Charter and all ordinances of the City.

22. Order of Business

The business of all regular meetings of the Council shall be generally transacted in the following order at the discretion of the Mayor:

1. Call to Order
2. Roll Call of Council
3. Pledge of Allegiance
4. Approval of Agenda
5. Presentations
6. Public Comment for Agenda Items
7. Consent Agenda
 - a. Approval of Minutes
 - b. Approval of Disbursement Reports
 - c. Acceptance of Departmental Reports
 - d. Routine and non-controversial action request
8. Petitions
9. Public Hearings
10. Action Request

- 11. City Administrator's Report
- 12. City Attorney's Report
- 13. Reports of Boards, Commissions and Committees
- 14. New Business
- 15. Old Business
- 16. Correspondence
- 17. Public Comment
- 18. Mayor and Council Comments
- 19. Adjournment

23. Parliamentary Procedure

The conduct of Council meetings shall be in accordance with the manual on parliamentary procedures entitled "Roberts Rules of Order".

24. Permission to Address Public Body / Public Comment Procedure

The following rules shall govern public comment during public meeting of a Lathrup Village public body:

- A. Public comment shall be allowed by the Chairperson one participant at a time.
- B. Participants shall not speak until they are recognized by the Chairperson.
- C. Each participant recognized by the Chairperson to address the public body shall identify himself/herself by name and, if appropriate, group affiliation for purposes of recordation in the meeting minutes.
- D. A participant addressing the public body shall be limited to three (3) minutes
- E. The Chairperson or public body member may, in the discretion of the Chairperson, be allowed to respond to participant questions posed, but the overall time limit of 3 minutes shall continue to run against the participant's allotted time.
- F. The Chairperson shall designate a timekeeper for purposes of enforcing the time limit.
- G. There shall be public comment, as approved in the meeting agenda, wherein participants may address the public body on any new business (non-agenda items) items.
- H. Participants addressing the public body shall make responsible comments and shall refrain from making redundant, personal, impertinent, slanderous, or profane remarks.

- I. Any participant who is “out of order” may be interrupted and gaveled “out of order” by the Chairperson with the end to maintain order and decorum of the meeting in the Chairperson’s discretion.
- J. A participant making public comment who is ruled “out of order” by the Chairperson:
 - a. May be admonished by the Chairperson and instructed to refrain from the indecorum, disruptive or other prohibited conduct.
 - b. Shall be allowed to continue his or her public comment within the time limits prescribed only if it is in conformity with the Chairperson’s instruction.
 - c. Shall be allowed to continue his or her public comment to the extent that it is within the approved time limit, with allowance for time lapsed by the Chairperson’s “out of order” ruling(s), or other public body members’ discussion/commentary.
 - d. Without limiting the discretion of the Chairperson, if an “out of order” participant repeatedly violates the ruling(s) by the Chairperson three (3) or more times, the Chairperson may instruct the participant that his or her public comment is concluded and instruct him/her to withdraw from addressing the public body, vacate the lectern, and return to their seat or other position in the audience at the meeting, or may exercise other lawful measures to restore decorum and maintain order.
 - e. The Chairperson may recess the meeting until such time as order and decorum is restored and shall allow the participant time to comply with the Chairperson’s instruction(s).
 - f. During any recess called to restore order the Chairperson may summon law enforcement officers to monitor the public meeting, if not already provided.
 - g. Any “out of order” participant shall not be ordered to be removed or excluded from the meeting unless he/she is in “breach of the peace” or inciting a “breach of the peace” at that meeting.
- K. A participant who is found to be “out of order,” shall be given a reasonable period of time to comply with the Chairperson’s directives.
- L. A participant who is found to be “out of order,” ordered to cease public comment, suffer removal from the meeting for “breach of the peace,” or otherwise have his/her public comment limited or restricted, except as to the expiration of time limit, shall be allowed upon his/her request to appeal the Chairperson’s ruling to the other public body members present and this appeal shall be decided by a roll call vote.
- M. No person shall be ejected, removed, or excluded from attending any part of a meeting unless he/she is causing a “breach of the peace” at that meeting.

N. Nothing in this policy shall be construed as creating a cause of action by a participant against the City of Lathrup Village, its public officers, law enforcement officers, or any other City of Lathrup public officials.

25. Video/Audio recording during a public meeting

Attendees shall be permitted to make video and sound recordings of a public meeting and to broadcast live. The following rules shall govern the video and sound recording during public meeting of a Lathrup Village public body in order to minimize disrupting the meeting:

- A. Unless otherwise allowed by the presiding officer, video recording devices shall only be permitted in a designated area subject to the following conditions:
 - a. Recording devices must be on a tripod, be set in one location and remain there (no portable equipment moving around the room).
 - b. Recording devices must operate without additional artificial light (no flash photography).
 - c. Recording devices must operate without additional audio (no additional microphones to be set-up in the room).
 - d. Recording devices must be set-up prior to the start of the public meeting and shall remain in one location until adjournment of the meeting to minimize disrupting the meeting.
- B. Individuals are prohibited from intentionally placing a recording device within close proximity to another attendee without their consent. This includes positioning the recording device in a manner that invades the personal space of the other attendee or obstructs their view.
- C. Individuals shall not utilize a recording device to intentionally frighten, intimidate, threaten, harass, or annoy any other person or to disturb an open meeting of a public body.

26. State or Federal Cooperation - Procedure

All proposals for projects which contemplate cooperation with, or financial participation by, the State or Federal government, shall be transmitted to Council by the City Administrator. If a City Board or Commission desires to propose such a project, the proposal shall first be filed with the City Administrator. All proposals shall be in approved form and accompanied by proper plans and specifications conforming to the requirements of respective State or Federal governments. If the Council approves the proposal, it shall by resolution authorize the City Administrator to make an application to the proper authority.

27. Suspension of Rules

Any provisions of these rules not governed by the Charter or Code may be temporarily suspended at any meeting of the Council by the Presiding Officer unless objected to by any Council member. Such objection must then be sustained by majority vote of the Council.

The vote on any such suspension shall be taken by "yeas" and "nays" and entered upon the records.

28. To Amend Rules

These rules may be amended, or new rules adopted by a majority vote of all members of the Council. Any such alterations of or amendments to, shall be submitted in writing at the preceding regular meeting and shall be placed on the calendar under the order of new business. This requirement shall be waived only by unanimous consent, with a recorded vote of all members.

Adopted
Replaces CO 79-7122, CO 80-62, CO 82-273a, 85-117a, 22-_____

City Administrator Evaluation
January 1, 2025 – December 31, 2025

Evaluation Process

1. Blank Evaluation Forms Are Submitted To The City Council by the City Administrator
2. City Administrator Submits A Self-Evaluation To City Council for Their Review
3. Evaluations Completed by Councilmembers Are Submitted To Mayor Kantor and Summarized
4. Summarized Evaluations Are discussed with the City Administrator and City Council at an upcoming meeting

Evaluations Definitions

The purpose of an evaluation should **not be** to end up with a "grade". Thus, it is anticipated that the resulting document will be in the form of a narrative. The evaluation format is simply a tool to accomplish two purposes:

- a) Have good communication, which can help in an individual's development
- b) Provide input to the preparation of the plans and goals for the year ahead.

The performance rating definitions are outlined below

- **Don't Know**- Insufficient observation to make an objective evaluation.
- **Unsatisfactory**- Significantly fails to perform in a satisfactory manner. Detracts from overall performance, requiring concentrated effort to improve within the year.
- **Needs Improvement**- Meets most requirements in this category but falls short of a fully satisfactory performance in meeting expectations.
- **Meets Expectations**- Competently performs all duties and responsibilities in this category in a fully satisfactory and consistent manner.
- **Exceeds Expectations**- Performs in a manner that typically exceeds the performance level one would expect for this position. Brings something "extra" to the job in the way of ideas, judgment, initiative, etc.
- **Outstanding**- Truly exceptional. Exceeds expectations in every respect. Performs in a manner that one would anticipate is significantly better than peers in similar positions.

Note:

Recommendation: City Administrator Evaluation

- A. **Relationships/Council**
 - 1) Communicates well with Council, keeping them informed of issues and events which may concern citizens.
 - 2) Is well prepared for Council meetings, provides adequate pre-work, and is appropriately helpful during Council meetings.
 - 3) Makes sound recommendations for Council action and development of priorities.
 - 4) Is open and responsive to input from and the needs of Council members.

Notes:

Recommendation:

B. Relationships/Others

- 1) Assures good communication with the community and shows sensitivity to the needs and concerns of citizens.
- 2) Keeps in contact with and provides (directly or by staff) appropriate guidance and assistance to City committees and boards.
- 3) Maintains positive working intergovernmental relationships (i.e., surrounding cities, counties, etc.)
- 4) Maintains positive working relationships with business owners in the city and their employees, both directly and through the city’s Economic Development Director.

Notes:

Recommendation:

C. Staff Management

- 1) Has a high-quality, well-motivated staff and supports professional development and career pathing.
- 2) Manages the staff well, including good delegation, communication, and the process of periodic re-evaluations.
- 3) Creates an office culture that is positive and welcoming, encouraging teamwork and a sense of family among staff.
- 4) Retains employees to the greatest degree possible.

Notes:

Recommendation:

D. Budget and Financial Management

- 1) Administers a budget process that provides the Council with quality information and data on which to make budget decisions.
- 2) Assures a budget that fits within a long-range plan, which recognizes the future financial needs of the town.
- 3) Provides a system, including appropriate reports to Council, which monitors and controls expenditures vs. budget.
- 4) In partnership with the city’s Financial Director, provides council with clear explanations of the content of the city’s budget and any budget amendments proposed by the City Administrator.

Notes:

Recommendation:

E. City Services

- 1) Assures the long-term existence of an adequate infrastructure for the town.

- 2) Maintains City services at a high-quality level consistent with City resources.

Notes:

Recommendation:

F. Program Management

- 1) Recommends and prioritizes programs consistent with City resources.
- 2) Assures approved programs are delivered on schedule and within budget.
- 3) Keeps Council apprised of any anticipated variances so they may be approved in advance.
- 4) Partners with City Council and the Planning Commission to assess the performance of the city’s contracted city planning provider on an annual basis.

Notes:

Recommendation:

G. Leadership

- 1) Creates an image of Lathrup Village as a quality community through their personal activities within the City and the region.
- 2) Maintains, through their activities outside the town, a leadership role that enhances the ability of the City to influence decisions that will impact Lathrup Village.

Notes:

Recommendation:



MANAGER EVALUATIONS GUIDE

June 2025

ICMA | membership

ABOUT ICMA

ICMA, the International City/County Management Association, advances professional local government through leadership, management, innovation, and ethics. ICMA provides member support; publications; data and information; peer and results-oriented assistance; and training and professional development to more than 13,000 city, town, and county experts and other individuals and organizations throughout the world. The management decisions made by ICMA’s members affect millions of individuals living in thousands of communities, from small villages and towns to large metropolitan areas.

Manager Evaluations Guide
June 2025

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TASK FORCE ON MANAGER EVALUATIONS

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PREFACE

Regular performance evaluations are a cornerstone of an organization's management systems. Evaluating the manager is as important as evaluating other employees, but the process has unique challenges. The 2012-2013 Executive Board of the International City/County Management Association (ICMA), led by then President Jim Malloy, acknowledged the need for local government managers and their elected bodies to have additional tools and resources to support their evaluation process and produced

a handbook to serve as a roadmap. In 2020-2021 a new Task Force on Manager Evaluations reviewed and updated the earlier handbook and produced the current guide. Refreshed with a new section and complete review in 2025.

Managers are encouraged to review this guide and work with their elected bodies to develop formal, mutually agreed-upon processes for their own evaluations. This guide is also intended to highlight the value of a formal manager evaluation process and to assist local elected officials in the design of an effective evaluation tool.

Definition of Terms

- The term *local government*, as used in this publication, refers to a town, village, borough, township, city, county, or legally constituted association of governments.
- The term *manager* refers to the local government's chief executive officer (CEO) or chief administrative officer (CAO) who has been appointed by the government's elected body to oversee day-to-day operations.
- The terms *elected officials*, *elected body*, *governing body*, and *board* refer to any council, commission, or other locally elected body, including assemblies, boards of trustees, boards of selectmen, boards of supervisors, boards of directors, and so on.
- The term *manager evaluation* refers to the appraisal or assessment conducted by the elected body of the manager's performance in achieving organizational goals and implementing policy.

SECTION 1

EXECUTIVE SUMMARY

The periodic evaluation of the local government manager by the elected body is an important component of a high-performance organization. The most important aspect of an evaluation is the conversation between the governing body and the manager. Without a structured evaluation, problems can arise, grow, and end up creating major issues for the manager, the governing body, and the organization. Conversely, without positive feedback offered in a meaningful way, a manager may not feel fully appreciated, particularly when he or she is leading the organization through difficult times. Lack of appreciation is a major reason that people begin looking for new jobs.

There are many ways to conduct an evaluation. In most cases, the manager begins by preparing a report of accomplishments/goals (a form of a self-assessment) that goes to the governing body. Then the evaluation is conducted in one of these typical ways:

1. The governing body members fill out an evaluation form; someone consolidates the responses; and the responses are discussed with the manager. The manager’s report is part of this discussion.
2. The governing body chair convenes a closed session without an evaluation form and asks his or her colleagues for their informal comments on the manager. Then they meet with the manager and discuss those comments, along with the manager’s report.
3. A third-party facilitator conducts interviews with each governing body member, prepares a confidential report, and facilitates a discussion in a closed session with the manager.

Sometimes a 360-degree component is utilized, as described later. When used, it should be done with care and thought.

The desired outcome of a performance evaluation should be mutual understanding by

all parties (all members of the governing body and the manager) on each person’s perspectives, consensus direction on goals, what the manager needs from the governing body to be successful, and any action steps coming out of the evaluation.

To be a meaningful evaluation, the conversation needs to go two ways: from the governing body to the manager, and from the manager to the governing body.

It is a relationship, and for the manager to be successful in his or her role, the relationship should be strengthened through the evaluation process. That means discussing the hard topics as well as the easy ones, such as how well the manager is doing. Addressing the things that are not going particularly well is critical for the manager to be successful.

The evaluation has two components:

- One component includes performance goals and objectives. These are linked to the elected body’s strategic plans, goals, and priorities, but they often include internal organizational goals that the manager is focusing on (for example, filling critical department head positions). The evaluation should address the manager’s degree of progress toward these goals and objectives, which should be identified in advance so expectations are clear.
- A second, and essential, component is the manager’s leadership and management. The “how” is as important as the “what” (goals). How a manager works can get him or her in trouble even when he or she is achieving goals. An evaluation should include questions relevant to the top executive role, customized to the particular situation.

It is important that all members of the elected body participate in the process. While the manager takes direction from the body, he or she

works for all of them and needs to understand each elected official's opinions and interests. Individual perspectives as well as collective views are important.

The manager should convey to the governing body why it is important for everyone to provide feedback. When the process includes use of an evaluation instrument, a deadline should be set for its completion, and someone should follow up to ensure that this is done. When a third-party facilitator is used to conduct interviews, a narrow timeline should be established to get the instruments completed and the report written.

There is no one correct way to conduct a manager evaluation. The key is to ensure that

the evaluation takes place in a regular, mutually agreed-upon manner and is viewed by all as an opportunity for communication between the elected officials and the manager.

It may be useful to use a consultant to help the elected body prepare for and conduct the manager's evaluation. A neutral third-party facilitator can ensure that the feedback is gathered in a comprehensive way, without bias. The facilitator will typically lead the discussion in the closed session with the manager as well, and then write up the results following the session.

SECTION 2

THE PURPOSE OF MANAGER EVALUATIONS

High-performance local governments embrace continual improvement. Conducting regular appraisals of the manager's work performance is part of the continual improvement process.

The purpose of the evaluation is to help the manager be successful in his or her role. Being the chief executive is not an easy job. The manager takes direction from the governing body and works for all members of the governing board.

The evaluation process, if done correctly, should increase communication between the members of the elected body and the manager concerning the manager's performance, leadership, and management. It should result in shared understanding by the governing body and the manager about expectations, interests, and goals for the coming year. It should also result in the governing body understanding what the manager needs from them to be successful.

The evaluation provides an opportunity for the elected body to have an honest dialogue with the manager about its expectations, to assess what is being accomplished, to recognize the manager's achievements and contributions, to identify any performance gaps, to develop standards to measure future performance, and to identify the resources and actions necessary to achieve the agreed-upon goals.

Keeping the focus on "big picture" strategic goals and behaviors rather than on minor issues or one-time mistakes/complaints leads to better outcomes.

Given that good relationships promote candor and constructive planning, the performance appraisal also provides a forum for both parties to discuss and strengthen the relationship between the elected body and the manager, ensuring better alignment of goals while reducing misunderstandings and surprises. When elected bodies conduct regular performance appraisals of the manager, they are more likely to achieve their community's goals and objectives.

There is no one way to conduct a performance evaluation, and different communities conduct evaluations of the manager differently. Section 3 discusses a basic approach to evaluation, and the section starting on page 18 describes such common approaches and tools as self-evaluations, periodic check-ins, 360-degree assessments, and facilitated evaluations to enhance and strengthen the evaluation process for a strong, outcome-based partnership.

SECTION 3

THE MANAGER EVALUATION PROCESS

Ideally, the performance appraisal process for a manager is the natural continuation of the hiring process, and a plan for evaluation should be established at the start.

INITIATING THE PROCESS

Prior to recruiting candidates, the elected body typically develops key goals and objectives for the manager position. During the selection process, the candidate(s) and the hiring body discuss these goals and objectives along with the long- and short-term needs and issues of the community. These conversations lay the groundwork for the manager's performance evaluation. At this point, the performance appraisal process should also be formalized.

A manager's employment agreement should stipulate that the performance evaluation will be formalized as a written document and that all parties will meet to discuss the contents in person. The agreement should also identify the frequency with which evaluations will take place (e.g., annually, semi-annually). By including this information in the employment agreement, the hiring body ensures that communications between the manager and the elected body will be consistently scheduled and that initiatives and objectives can be reviewed and updated on a regular basis.

Frequency and Timing. In considering the timing of evaluations, it is recommended that the first formal evaluation take place after the manager and elected body have worked together for a year.

Sometimes, a new manager prefers that the first evaluation take place at the six-month point. This can be helpful as a check-in to ensure that the new manager is on track, that any early issues arising can be addressed quickly, and that if the manager needs something from the governing body, he or she can bring that up for discussion.

It is further recommended that the evaluation be scheduled during the least busy time of the year for the manager and the elected officials, avoiding both the budget preparation season (particularly if the manager's compensation is tied to the evaluation) and the election season (lest the evaluation become an election issue). The scheduling should also allow adequate time for newly elected members of the board to become familiar with the manager's performance.

If performance evaluations were not discussed at the time of hiring, either the manager or a member of the elected body may request that an evaluation process be instituted, and the specifics for conducting the evaluation can then be agreed upon outside of the provisions of the employment agreement.

If the request is made by a member of the elected body, it is important to emphasize that the purpose of the evaluation is to serve as a tool for mutual success of the manager, organization, and governing body, not as a means of punishing the manager or setting the stage for termination. While elected officials, especially those who are newly elected, may sometimes wish for a change in management, the performance evaluation should not be used to effect such a change.

Setting Expectations. It is helpful for the elected body to come to consensus on the initial expectations of the newly hired manager so that priorities can be assigned and progress measured. Issues that were important when the manager was hired will logically factor into the initial evaluation. Then, in the succeeding years, the expectations are typically updated to reflect the latest accomplishments and newest challenges. Of course, priorities may shift during the year. If that happens, the manager and governing body should mutually adjust the priorities to reflect the new realities and incorporate those in the evaluation process.

One priority that should not shift over time is the expectation that the professional manager will abide by and promote the **ICMA Code of Ethics**. The manager’s commitment to the tenets in the Code should have been clarified and understood by all parties during the hiring process.

If, with the passage of time, elections have taken place and the board that is conducting the evaluation is not the same board that hired the manager, it is important that the newly elected officials quickly be introduced to the established performance goals, measures, and evaluation process. This can be done as part of the orientation for new board members, included in a discussion of the form of government and the role of the manager. If any new members lack experience conducting performance evaluations, they will need training before participating in the process. The manager can provide an overview during orientation, and then provide the specific training in advance of the evaluation process.

A few issues should be considered when preparing for the evaluation, including how to develop an evaluation form (if one is used), whether to use an outside consultant, how to use an evaluation form, and whether the evaluation should be conducted in private or in public.

DEVELOPING AN EVALUATION FORM

Unlike most employee performance evaluations, in which the employee is evaluated by a single executive or supervisor, the manager’s evaluation is conducted by a group of individuals acting as a body. As each elected official likely has different expectations, the board members must first come to a consensus on the measures and definitions to be used.

To be most useful, the evaluation form should be outcome-based, using criteria that have been developed collaboratively with the manager. The form would incorporate the elected body’s agreed-upon priorities—ideally through a strategic planning process—as well as leadership and management criteria. The performance criteria on the evaluation form should be ones on which the elected body can offer meaningful

feedback because they can observe the manager’s performance in those areas.

DECIDING WHETHER TO USE A CONSULTANT

Using an outside facilitator for the evaluation can help ensure that each member of the elected body has equal input and that the feedback is fairly represented. Most typically this involves an interview with each member of the elected body by the facilitator, who asks a set of questions and prepares a confidential report.

A third party can also ensure that areas of agreement among the elected officials regarding the manager are highlighted, along with those areas of disagreement and issues that will warrant the most discussion during the session with the manager.

Before the governing body attempts to “speak with one voice,” it is important to have a session with the manager. This is because the answers given by a single governing body member prior to the conversation in the closed session might be enlightened through discussion. Therefore, if the governing body tries to consolidate its views without benefit of insights and reflections from the manager, it is limiting its perspective too early in the process. Use of an independent consultant is especially helpful if there is a lack of cohesion among elected officials.

A consultant can be used in a variety of ways:

- At a minimal level, a consultant could be used to simply prepare an evaluation process and an evaluation form, consolidate the responses from the elected officials, and prepare a report. The consultant could then provide guidance to the board chair on how to conduct the evaluation session with the manager.
- At a more comprehensive level, a consultant can conduct individual interviews with each member of the governing body (with structured questions but not a form), prepare a confidential report, and facilitate the closed session with the governing body

continues on page 12

Tips for the Closed Session Discussion

These tips are intended for governing body members conducting an evaluation. Throughout the session, it is important for governing body members to encourage the manager to actively participate. Success is a collaboration, and the communication needs to go two ways to result in mutual understanding. Seek the manager’s feedback as the conversation flows. Avoid coming to conclusions or judgments without giving the manager an opportunity to provide his or her perspective.

Useful performance evaluations will:

- Recognize the accomplishments of the manager and show appreciation for his or her unique contributions to the organization.
- Clearly identify areas where the manager is doing well.
- Clearly identify areas where the manager can improve performance.
- Specify definite actions that will allow the manager to make additional value-added contributions to the organization in the future.
- Obtain the manager’s own assessments of progress and his or her individual contribution to collective actions and achievements.

Discussing tasks that the manager performs well:

- Gives the manager an understanding of what he or she is appreciated for, including some things that may not be apparent to the manager.
- Gives the manager recognition and appreciation for achievements, not only of the manager but of the organization.
- Creates a positive climate for the remainder of the evaluation.

Reminders for the positive feedback portion of the discussion:

- Listen intently.

- Reinforce what is positive about the manager’s performance and should continue.
- Provide concrete examples and specific descriptions of actions, work, and results.
- Give only positive feedback during this part of the evaluation.
- Acknowledge improvements that the manager has made.
- Praise efforts if the manager has worked hard on something but failed because of circumstances beyond his or her control.

Discussing areas that need improvement

- Gives insight into behaviors that might be blind spots for the manager but that are of concern to governing body members.
- Offers an opportunity to hear how the manager feels about change and improvement for growth.
- Allows governing body members to express any concerns about the manager’s overall performance and performance in specific areas.
- Encourages the manager to higher levels of achievement.

Reminders for governing body members:

- Keep the discussion focused on performance.
- Describe actions and results that do not meet expectations.

- Describe areas where the manager can make a greater contribution. Describe any observed situation or performance that needs to be changed; be specific.
- Tell the manager what needs to be done if a specific change of behavior needs to take place.
- Focus on learning from the past and planning for the future.
- Keep this part of the discussion as positive and encouraging as possible.

Do's and Don'ts

(These pertain to when the governing body chair leads the discussion and there is no facilitator involved. When a neutral third party is facilitating, the process will be different.)

Do's for the Governing Body Chair

- At the start, spend a few minutes warming up and laying out the agenda so everyone is reminded about what to expect. Give an overview.
- Explain that the manager will participate in the session. Hearing from the manager as part of the conversation is essential.
- Always start with the positives. Be specific.
- Explain the evaluation feedback in all areas: Talk about the differences and similarities in how governing body members evaluated the manager, and how consensus was achieved (when it is). The manager should be in the room when the feedback is discussed so he or she understands the reasoning. Without that grounding, misunderstandings can arise, even if "direction" appears clear.
- Be honest. Tell it like it is.
- Be a coach, not a judge. As in athletics, effective coaching involves a lot more than just scorekeeping. Simply providing

the score at the end of the game doesn't improve performance.

- Ask the manager for his or her feedback regarding what was shared, making clear that you are interested in his or her feelings and thoughts.
- When appropriate, in concert with the manager, develop an improvement plan that includes areas of deficiency and developmental needs.

Don'ts for all members of the governing body:

- Don't evaluate the manager on any given dimension without the facts. Feedback should be based on actual results or examples. A "cannot answer" is better than a rating that is not supported by any examples or facts.
- Don't be too general. Support your answer with examples.
- Don't sidestep problems. Describe what you observe as performance problems and clearly identify what needs improvement.
- Don't be vague or generalize the reasons for your performance feedback. Provide clear and specific examples of desired results and expectations. Also understand that what you as an individual elected official expect by way of results may not be what your colleagues expect, and the manager takes direction from the governing body as a whole.
- Don't ambush the manager by identifying deficiencies or problems that have never been addressed in informal discussions prior to the formal evaluation.
- Don't minimize the manager's concerns or discount his or her feelings. Ask the manager's perspectives. A manager does not work in a vacuum. Seek to understand his or her views.

and manager. Following the session, the consultant can prepare a memorandum documenting the resulting agreements of the elected officials and the manager.

When using an evaluation form, a consultant should solicit each elected official’s full participation by asking for examples and details for each category of performance on which the manager is being evaluated. It is important to ensure that all voices are heard and that specific feedback can be provided.

Once the consultant has collected the completed evaluation forms, he or she should meet with the manager to review the results of the feedback, so that the manager can be prepared for the in-person closed session with the entire governing body. Because the premise is that the evaluation is geared toward helping the manager be successful in his or her role, it is important that feedback not be viewed as a “gotcha” and that the manager can reflect on it prior to the conversation with the governing board.

If desired, the consultant can also review the consolidated feedback with the chair or mayor of the elected body to review the consolidated feedback.

If the elected body decides to use a consultant, they can get referrals from several sources, including the **ICMA Senior Advisors**, other managers in the region, the state league, the Society for Human Resource Management (**SHRM**), or the local government’s regular employment consulting firms. If an executive recruiter was used to assist in hiring the manager, the recruiter may have the appropriate skills and background to set up the initial evaluation process.

It is recommended that the evaluation process NOT be facilitated by the local government’s corporation counsel, municipal clerk, or human resources director because these individuals are not independent parties. In almost all cases, their positions have either a reporting or a cooperating relationship with the manager, so involving them in the manager’s evaluation may damage relationships that are necessary for the effective and efficient operation of the local government.

If a consultant is not used to facilitate the development of an evaluation form, the manager can obtain examples of other forms, as well as review the one used for department heads in his or her jurisdiction and modify so it is meaningful for the chief executive role. It is important to understand that a manager is evaluated on performance that differs from that of most other employees. Because of this key difference, flexibility is needed to add any necessary components intended to assess varied goals and objectives and to facilitate a dialogue between the elected body and the manager.

USING THE EVALUATION FORM

The usefulness of any performance evaluation depends almost entirely on the understanding, impartiality, and objectivity with which feedback is offered. In order to obtain a useful evaluation, an evaluator should differentiate between personality and performance. This is challenging in the case of the chief executive, where intangibles are of great importance to governing body members. But elected officials can be advised to focus on performance and how the manager’s work and approach contribute to the success of the local government.

Limit the Number of Criteria. The evaluation form should not have too many criteria for providing feedback. Having a form with too many questions or criteria can result in “survey fatigue,” answers that are too short or meaningless, or non-responses.

Ideally, no more than 10 questions or criteria should be used on an evaluation form, with descriptive ratings, not points. Then a series of open-ended questions should be used.

Use Descriptive Ratings, Not Points. Numerical ratings are very difficult to norm. Some evaluators are “hard graders” and will never give anyone the highest possible rating. Others will just check boxes without giving any thought to what the numbers mean.

Keeping the purpose of the evaluation in mind, it is more beneficial to ask for the elected officials to offer their evaluative and descriptive feedback.

Performance Evaluation Outline

The following outline provides an overview to use for the in-person portion of the manager’s evaluation when the governing body chair is leading the discussion.

Agenda

1. Opening remarks from the board chair (see suggested language below)
2. Overview of feedback (either from the board chair or consultant if used)
3. Reflection and overview from the manager
4. Summary comments from each member of the elected body (comments should focus on what each one values in the manager and what would be beneficial to change; 3 minutes for each person)
 - Questions or comments from the manager
 - Final reflections from the manager (the opportunity for the manager to summarize)
 - Summary comments from the board chair
 - Any actions to be taken (development or expected results): Keep doing, stop doing, start doing

go when we know how we feel is not the sense of the group, and at the same time acknowledge that our colleagues do not all share the same opinion. Our aim is to help the manager be successful in [his/her] role. As a result of this evaluation, we want the manager to feel motivated, energized, challenged, and appreciated and have clarity of action and next steps. And that [he/she] has been part of the conversation. It will be a two-way conversation.

“The annual review looks back on the past year as a whole. We deal with so many issues over the course of the year that it’s easy to fall back on the past few months. So let’s remember to think about the year in its entirety.”

Review the agenda (above) and note that the facilitator will help with time and manage the flow of conversation (if a facilitator is being used)

Provide closure:

“At the end of the evaluation I will provide remarks that summarize both the spirit of the body and our appreciation for our staff, the tone of the conversation and the actions we hope our manager will take from the conversation.”

[If a facilitator is used, this is often the role of that individual.]

Opening Remarks from the Board Chair

State intentions up front. Setting the stage is one of the most critical things you can do. Here is suggested language:

“It is important for the manager to hear from us. When it comes to expectations and goals, we will be speaking as a body. We also have individual perspectives, and our manager needs to hear those as well. Our challenge, personally, is to let

Examples are:

- On Track, Outperforming, Needs Improvement, Cannot Evaluate.
- Include a “comment” line for each of the criteria, asking for examples to support the evaluation rating.

Have Open-ended Questions. Additionally, open-ended questions are quite important. Typically, these provide the most meaningful feedback for a manager. Examples are:

- What are the top three strengths of the manager?
- What opportunities for improvement do you suggest for the manager?
- Do you agree with the goals suggested by

the manager in his/her self-assessment/ accomplishments/goals report? What others would you suggest?

- What does the governing body do to support the manager’s success? What else could we do?
- What other comments do you have?

As noted earlier, it is recommended that the initial formal evaluation not take place until the elected officials and the manager have worked together for a year; however, short, less formal evaluations can be useful on a quarterly or semi-annual basis. After that, at least one formal evaluation (still with periodic informal evaluations) should be conducted per year, as longer intervals create a higher likelihood of miscommunication and surprises.

Competencies for Management and Leadership

The manager’s success in achieving the goals set by the elected body is related to his or her competencies and behaviors with respect to the specific functions identified as the responsibility of the manager. Defining the strengths of the manager and identifying areas for improvement are part of the evaluation.

ICMA has developed a list of 14 critical core competencies, the **Practices for Effective Local Government Management and Leadership**. The list was developed for the purpose of the **ICMA Voluntary Credentialing Program**, but the manager and elected body might find it helpful for identifying the specific observable behaviors to be used in the manager evaluation. It is suggested that the manager and elected body select what they believe to be the most important areas for achieving its goals and evaluate the manager’s performance in these areas.

These are the ICMA Practices (full descriptions [can be found at icma.org](http://icma.org)):

1. Personal and professional integrity
2. Community engagement
3. Equity and inclusion
4. Staff effectiveness
5. Personal resiliency and development
6. Strategic leadership
7. Strategic planning
8. Policy facilitation and implementation
9. Community and resident service
10. Service delivery
11. Technological literacy
12. Financial management and budgeting
13. Human resources management and workforce engagement
14. Communication and information sharing.

No feedback on any of the criteria in the evaluation should be a surprise. Ongoing conversations should be held throughout the year (assuming that the evaluation is done annually) to help the manager understand if he or she is on course or if any interim corrections are necessary. Ideally, the criteria in the evaluation will have already been touched on in earlier conversations, so the evaluation will serve as a written summary of them.

PUBLIC VERSUS PRIVATE EVALUATIONS

Unless required by state law, it is recommended that the performance evaluation conversation with the governing body and manager be conducted in a closed session. This will foster the most productive open dialogue and conversation. A public setting is likely to make this difficult or impossible. In states where evaluations cannot be conducted in closed sessions, care should be taken to ensure that the evaluation does no harm to the goal of supporting the manager’s success in his or her role.

Many states have specific laws about whether and when the public may be excluded from attending a meeting involving the elected body or from having access to certain records involving a public employee.

Such “sunshine” laws were first created to increase public disclosure by governmental agencies. Their purpose is to promote accountability and transparency by allowing the public to see how decisions are made and how money is allocated.

While all states have such laws, the exact provisions vary. For example, specific legislation may require that all government meetings be open to the public or that written records be released upon request. In many states, all local government records are available for review by the public, including evaluation documents and notes, unless they are specifically exempted or their disclosure prohibited by state statutes.

If evaluation forms and reports are required to be made public, then that is an important

factor in whether such documents should even be prepared. ***The question should be whether having them in the public arena will advance the purpose of the evaluation—which is to help the manager be successful in his or her job and promote constructive conversation—or whether it will hinder that purpose.*** When such documents will become public, then it is advised that they not be created in the first place, and that the evaluation be verbal. It can still be structured, but with no written reports. Again, state law needs to dictate what is possible. Doing no harm needs to be an important consideration in how to proceed.

Regardless of whether the evaluation is conducted in a public or closed session, each state’s statute will dictate certain procedures for meeting notification, recording of minutes, and disclosure of decisions. These procedures should be reviewed by the elected officials, the manager, and legal counsel and followed throughout the evaluation process.

No matter what procedures are dictated by state statute, all final decisions or actions related to the manager’s performance pertaining to employment agreement changes and compensation should be made public. If state law does not require it, however, the performance evaluation reports should be retained as confidential personnel documents.

EVALUATION RESULTS

The evaluation serves as the written, formal record of the conversation between the manager and the elected body and consists of two important sections. The first section is the elected body’s appraisal of the manager’s performance with respect to the previously agreed-upon goals for the period under review as well as the general performance of the organization. The second section contains an agreed-upon list of the goals for the next appraisal period as well as any specific performance areas identified for improvement.

SECTION 4

RELATIONSHIP OF EVALUATION TO COMPENSATION

To summarize, the primary purposes of a manager’s performance evaluation are

1. To support the success of the manager in his or her role by providing meaningful feedback, ensuring alignment of expectations, and identifying how the governing body can be helpful to the manager.
2. To provide a tool for communication between the elected body and the manager.
3. To provide an opportunity for the elected body to specifically indicate levels of satisfaction with the manager on mutually identified and defined performance priorities.
4. To provide an opportunity for the manager to learn and improve, and to share feedback with the governing body.

In addition, the evaluation can allow for fair and equitable compensation adjustments based on a review of performance in achieving mutually identified priorities and on the elected body’s level of satisfaction with the manager’s overall performance. However, performance evaluations that are tied directly to compensation decisions are often distorted by those decisions and therefore result in less-than-honest communication between the elected body and the manager. This happens primarily because

1. Elected officials wishing to offer upward compensation adjustments may feel obliged to embellish the evaluation in a positive manner to justify the compensation decision to the public.
2. Elected officials not wishing to adjust compensation may feel obligated to justify their decision with negative comments about

performance that actually are not a major concern to them.

3. The manager may be reluctant to seek full clarification on issues raised in the evaluation for fear it could result in a reconsideration of the compensation decision.

To avoid these distortions, a balanced evaluation is necessary: the evaluation should provide the opportunity for open communication and at the same time be used for compensation decisions related to identified achievements and corrective actions by the manager. To this end, a balanced evaluation would

1. Establish a clear set of performance expectations prior to the evaluation period.
2. Include an interim evaluation without any consideration of compensation to focus on clarity of communication and performance to date. This evaluation would allow the manager to address areas of performance that were of concern to the elected body.
3. Use a full-term evaluation to assess the level of satisfaction for the entire performance period and thus provide the basis for a fair and equitable compensation decision.

Often, factors other than the manager’s performance enter compensation decisions, including

1. The economic climate of the community and region.
2. The status of compensation in the local private sector.
3. Compensation for other employees of the local government.

4. A general review of the competitive position of the local government in the local market area.
5. A comparative salary review.

In summary, the evaluation of a professional manager's performance can provide input into compensation decisions by the local elected body, but the value of an evaluation as a means of communication is best served by a periodic evaluation not directly tied to compensation.

SECTION 5

WHAT OTHERS ARE DOING

Performance evaluations can be enhanced in several ways—by using self-evaluations, periodic check-ins, 360-degree assessments, and/or a facilitated evaluation system.

SELF-EVALUATIONS

It is recommended that a self-evaluation be included in any manager's evaluation. The purpose of a self-evaluation is for the manager to reflect on his or her performance in achieving the organizational objectives, including both internal and external accomplishments and challenges in handling specific tasks and providing organizational direction and leadership.

In a public setting, process and perception can be as important as outcomes, and managers should include all three in a self-evaluation. Thus, a manager's self-evaluation should make clear to elected officials the process by which the manager pursued individual goals, and the perceptions of both the manager and stakeholders of the manager's success or failure in meeting those goals. A manager's self-evaluation should be customized to the needs of each governmental entity.

PERIODIC CHECK-INS—NO SURPRISES

As suggested earlier, there should be no surprises during an evaluation. Managers should be continually evaluating, assessing, measuring, and communicating with employees. Providing this type of continuous evaluation is a particular challenge, however, for elected boards because it requires the participation of all board members—the manager reports to a group and not to a single individual supervisor. But the manager is communicating regularly with all members of the elected body, and there are ample opportunities to hear and solicit feedback one-on-one from the elected officials.

If a process is in place for formal evaluations of the manager, such evaluations likely occur just once per year. The annual evaluation can be a stressful time for all involved, and it can also be a challenge to remember everything that has occurred over the past year. Moreover, it is easy for annual assessments to skew toward recent events, challenges, and successes while deemphasizing activities that occurred nine or ten months earlier. In reality, an elected body's perception of a manager's job performance is often viewed through lenses crafted by the "crisis of the day" or by how smoothly the last board meeting went.

Periodic check-ins on goals, such as once per quarter, can help reduce the stress and minimize the surprises that can come when a manager's performance is evaluated only annually. A periodic review of a manager's work plan can help remind the elected body of the manager's long-term goals (as set by the organization) so that both parties can evaluate the manager's progress toward achieving those goals. If progress on the work plan has slowed down, or if other challenges have arisen along the way, a quarterly check-in offers the manager an opportunity to self-reflect on his or her performance as well as a forum to explain delays. It can also provide the manager the opportunity to remind the board of the 14 core areas described in the [ICMA Practices for Effective Local Government Management and Leadership](#) that are critical and are part of operating effectively on a day-to-day basis.

A periodic check-in on the manager's work plan is also important when the members of the elected board change, such as after an election, resignation, or committee reassignments. By apprising the new board members of the manager's work plan, the manager is making certain that they understand and are supportive of the projects or goals that he or she is working on.

360-DEGREE ASSESSMENTS

Another form of appraisal is the 360-degree or multi-rater assessment. Generally speaking, the 360-degree assessment collects feedback from supervisors, subordinates, and peers. The manager completes a self-evaluation as well, and a sample of the workforce provides the feedback from subordinates. In some instances, feedback is also obtained from individuals outside the organization, such as residents who have frequently worked with the manager and/or who use the jurisdiction's services regularly.

Some jurisdictions include a 360-degree assessment as part of the manager's appraisal process. The [ICMA Voluntary Credentialing Program](#) requires credentialed managers to complete a multi-rater assessment as a professional development planning tool within five years of entering the program.

In most cases a 360-degree assessment is conducted online, and the individuals completing the assessment are the direct reports to the manager. Raters complete evaluation forms that are returned electronically to an independent third party in order to ensure anonymity and confidentiality.

One of the chief benefits of the 360-degree assessment is that it provides feedback on competencies that may be missing and therefore not addressed in the typical performance appraisal. For instance, staff will see behaviors that elected officials do not see and vice versa. Thus, a manager's performance may be improved because it is evaluated from several perspectives. However, if the 360-degree assessment is used as part of the appraisal process, it's important that the evaluation doesn't become a measure of the manager's popularity with staff or the public. The manager works for the elected officials and should be evaluated by them on the basis of their defined expectations.

FACILITATED PERFORMANCE EVALUATION

A facilitated evaluation presents opportunities for both the elected officials and the executive to

engage in a useful exercise. The elected officials have a way to candidly and thoroughly offer their individual feedback, with the governing body then reaching agreement as a whole on goals and expectations. This section is a slightly modified version of the article "A Better Way: The Facilitated CAO Performance Review" by Dan Keen and Jan Perkins in the August 2022 issue of *PM Magazine*.

Benefits for Governing Bodies. The facilitated evaluation process offers many benefits for elected officials.

- 1. It professionalizes the process.** Most elected officials aren't trained in performing employee evaluations. Even for those who do them at work, the process of evaluating an executive appointed by a governing body is very different, given the multiple elected officials in a public organization instead of just one supervisor in other settings. Councils also turn over regularly, so often there are members who haven't been through an evaluation process yet. The facilitated evaluation brings consistency and professionalism to the process.
- 2. It values all opinions.** Often in a council-led evaluation, one or two voices come to dominate the discussion. A facilitator can structure the process so that everyone's opinions are given equal weight and can be expressed in a thoughtful, reflective setting, rather than in a group discussion that can meander or become contentious.
- 3. It makes the process easier.** In a mayor- or council-led evaluation, elected officials not only have to consider and compose feedback, but they must also manage all aspects of the process. With a facilitator, one person is responsible for managing the evaluation from start to finish, and the board or governing body members can concentrate on formulating useful feedback for the manager.
- 4. It creates clarity.** Sometimes governing body members have never had a chance to consider the appointed officials' role in executing

their expectations. The facilitated evaluation allows members to share with each other how they perceive the manager’s role and consider views other than their own. Often a much richer and more nuanced picture of the governing body’s vision emerges when they have a chance to consider the manager’s role and performance.

Benefits for the Manager. The facilitated performance evaluation also helps the manager.

- 1. **It results in meaningful feedback.** Working for multiple governing body members means multiple opinions. This kind of evaluation includes the important step of analyzing and synthesizing the feedback so the manager gets a clear picture of how the governing body as a whole sees the manager’s work.
- 2. **It clears the air.** When the facilitator has a background in local government (which is helpful), he or she can point out little things gathered in the process that the manager can attend to. For instance, if a manager has not personalized his or her office with family photos or professional mementos, it might cause some governing body members to wonder whether the manager was committed to the job. The facilitator could alert the manager and help alleviate a potential point of ongoing doubt.
- 3. **It separates the message from the messenger.** When a governing body member makes a pointed criticism of a manager during an evaluation, it can sting. But when the same criticism is presented as a data point in a comprehensive evaluation report, it often feels less personal and more actionable.
- 4. **It focuses on opportunities.** When structured correctly, the evaluation is a forward-looking process, focused on aligning the council’s expectations with the manager’s performance. The best processes are results-oriented, increasing collaboration and contributing to the success of both the manager and the governing board.

It can be helpful when the evaluation includes a 360-degree assessment, with staff offering

feedback. Managers can learn some important things by hearing from their direct reports. This can be done through either interviews or a survey instrument.

ADDITIONAL CONSIDERATIONS

A word of caution: Numbered rating systems are popular for performance evaluations—but whether the governing body uses a facilitator or not, a numbered rating system is never helpful. Evaluating someone’s performance is a complex process, and reducing it to a scale of 1 to 5 helps neither the evaluated nor the evaluators. Some people are “hard graders” and others just check the top box. Some will use numerical ratings to avoid providing specific, meaningful feedback, and these ratings reduce the amount of feedback provided to the manager, and often produce a muddled and confusing result without clear direction to the manager.

Some elected officials may balk at paying for a process that they believe they can do themselves, but given the significant investment that governing bodies make in their managers, the number of staff and budgets that managers are responsible for, and the importance of assessing and correcting course as needed, the cost of facilitation is minimal when considered alongside the benefits.

This process can act as an investment by creating cost savings from avoiding breakdowns in the council-manager relationship, which could result in premature departures of the manager, terminations, and significant expense for severance payments and legal costs. A facilitated process is an efficient way to assist the council and manager in conveying the gift of meaningful feedback that is not only needed but deserved by a council appointee.

DATA-GATHERING/SOFTWARE RESOURCES

Performance evaluation software can be an effective tool to help the elected body prepare the manager’s evaluation. Many programs are available, enabling elected bodies to have as much or as little input into the rating categories as they

wish. Some programs come with rating categories already provided for a variety of positions; some allow the customer to provide the categories; and some are a hybrid. This flexibility allows the elected officials to create a customized rating tool that works best for them.

Some evaluation software programs allow for multiple raters and some for a single rater. If the program allows for only a single rater, all elected officials convene to discuss each category, agree on the rating, and offer comments, while one person enters the rating and comments into the software program. In this case, the elected officials need to trust that all opinions are being heard and recorded. It is then important that all elected officials review the final draft and offer feedback before it is given to the manager.

If a multi-rater system is used, elected officials will complete the evaluation individually, so it is recommended that there be group discussion beforehand to ensure a consistent understanding of the meaning of the rating categories and the elected officials' views of the manager's

performance. The elected officials should also meet after they have entered their ratings because the evaluation is a group activity, not a multiple individual activity.

A word of warning regarding the multi-rater approach: It may be difficult to ensure that everyone fully participates in the process; elected officials won't be informed by each other's comments; and consensus can be hard to achieve. Thus, if some elected officials provide more commentary than others, they could skew the overall evaluation.

Even with the use of software, an in-person conversation between the elected body and the manager is needed to review the evaluation and discuss the results.

As noted, many software programs are available. ICMA's Membership Team (careers@icma.org) can assist with the latest tools, as can SHRM. Also, ICMA members can post a question on [ICMA Connect](#) to see what tools other members are using.

SECTION 6

CONCLUSION

Communication. That is the essential element to maintaining a good relationship between an elected board and the appointed manager. Communication comes in many forms, but the board's evaluation of the manager is a formalized method of communication that should not be overlooked.

The ICMA task force that was formed to develop this guide compiled and considered the best practices for manager evaluations. The group shared numerous ideas and learned a great deal from each other. The final product demonstrates that just as each manager and board is unique, so too must be the evaluation process for each manager. While there are common methods of evaluation, the tools and methods used to evaluate one manager in one community may not be appropriate for another manager in a neighboring community. To maximize legitimacy and effectiveness and to enhance communication,

a manager's evaluation needs to be tailored to the issues and stated goals of the elected body.

That said, the task force also agreed that there are some standard elements—notably, the **ICMA Practices for Effective Local Government Management and Leadership**—that would enhance any evaluation. These 14 core competencies are the framework for what a manager does on a day-to-day basis, and they warrant acknowledgment in the evaluation process.

Finally, while this guide offers a variety of ideas, the most important takeaways are that a manager's evaluation must take place and that the process must be mutually agreed upon. There are many ways to get this done, but the manager and the board both deserve the structured communication that the evaluation provides.

SECTION 7

RESOURCES

[ICMA Practices for Effective Local Government Management and Leadership](#)

[Recruitment Guidelines for Selecting a Local Government Administrator](#)

[ICMA Model Employment Agreement](#) (available to ICMA members)

[ICMA Code of Ethics with Guidelines](#)

ICMA's Membership Team (careers@icma.org) can provide examples of performance evaluation forms and tools. Members are also encouraged to post questions on [ICMA Connect](#) to see what other members are using.



INTERNATIONAL CITY/COUNTY MANAGEMENT ASSOCIATION

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City Manager Performance Evaluation

City of _____

Evaluation period: _____ to _____

Governing Body Member's Name

Each member of the governing body should complete this evaluation form, sign it in the space below, and return it to _____. The deadline for submitting this performance evaluation is _____. Evaluations will be summarized and included on the agenda for discussion at the work session on _____.

Mayor's Signature

Date

Governing Body Member's Signature

Date Submitted

INSTRUCTIONS

This evaluation form contains ten categories of evaluation criteria. Each category contains a statement to describe a behavior standard in that category. For each statement, use the following scale to indicate your rating of the city manager’s performance.

- 5 = Excellent** (almost always exceeds the performance standard)
- 4 = Above average** (generally exceeds the performance standard)
- 3 = Average** (generally meets the performance standard)
- 2 = Below average** (usually does not meet the performance standard)
- 1 = Poor** (rarely meets the performance standard)

Any item left blank will be interpreted as a score of “3 = Average”

This evaluation form also contains a provision for entering narrative comments, including an opportunity to enter responses to specific questions and an opportunity to list any comments you believe appropriate and pertinent to the rating period. Please write legibly.

Leave all pages of this evaluation form attached. Initial each page. Sign and date the cover page. On the date space of the cover page, enter the date the evaluation form was submitted. All evaluations presented prior to the deadline identified on the cover page will be summarized into a performance evaluation to be presented by the governing body to the city manager as part of the agenda for the meeting indicated on the cover page.

PERFORMANCE CATEGORY SCORING

1. INDIVIDUAL CHARACTERISTICS

- _____ Diligent and thorough in the discharge of duties, “self-starter”
- _____ Exercises good judgment
- _____ Displays enthusiasm, cooperation, and will to adapt
- _____ Mental and physical stamina appropriate for the position
- _____ Exhibits composure, appearance and attitude appropriate for executive position

Add the values from above and enter the subtotal _____ ÷ 5 = _____ score for this category

2. PROFESSIONAL SKILLS AND STATUS

- _____ Maintains knowledge of current developments affecting the practice of local government management
- _____ Demonstrates a capacity for innovation and creativity
- _____ Anticipates and analyzes problems to develop effective approaches for solving them
- _____ Willing to try new ideas proposed by governing body members and/or staff
- _____ Sets a professional example by handling affairs of the public office in a fair and impartial manner

Add the values from above and enter the subtotal _____ ÷ 5 = _____ score for this category

3. RELATIONS WITH ELECTED MEMBERS OF THE GOVERNING BODY

- _____ Carries out directives of the body as a whole as opposed to those of any one member or minority group
- _____ Sets meeting agendas that reflect the guidance of the governing body and avoids unnecessary involvement in administrative actions
- _____ Disseminates complete and accurate information equally to all members in a timely manner
- _____ Assists by facilitating decision making without usurping authority
- _____ Responds well to requests, advice, and constructive criticism

Add the values from above and enter the subtotal _____ ÷ 5 = _____ score for this category

4. POLICY EXECUTION

- _____ Implements governing body actions in accordance with the intent of council
- _____ Supports the actions of the governing body after a decision has been reached, both inside and outside the organization
- _____ Understands, supports, and enforces local government’s laws, policies, and ordinances
- _____ Reviews ordinance and policy procedures periodically to suggest improvements to their effectiveness
- _____ Offers workable alternatives to the governing body for changes in law or policy when an existing policy or ordinance is no longer practical

Add the values from above and enter the subtotal _____ ÷ 5 = _____ score for this category

5. REPORTING

____ Provides regular information and reports to the governing body concerning matters of importance to the local government, using the city charter as guide

____ Responds in a timely manner to requests from the governing body for special reports

____ Takes the initiative to provide information, advice, and recommendations to the governing body on matters that are non-routine and not administrative in nature

____ Reports produced by the manager are accurate, comprehensive, concise and written to their intended audience

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

Add the values from above and enter the subtotal ____ ÷ 5 = ____ score for this category

6. CITIZEN RELATIONS

____ Responsive to requests from citizens

____ Demonstrates a dedication to service to the community and its citizens

____ Maintains a nonpartisan approach in dealing with the news media

____ Meets with and listens to members of the community to discuss their concerns and strives to understand their interests

____ Gives an appropriate effort to maintain citizen satisfaction with city services

Add the values from above and enter the subtotal ____ ÷ 5 = ____ score for this category

7. STAFFING

____ Recruits and retains competent personnel for staff positions

____ Applies an appropriate level of supervision to improve any areas of substandard performance

____ Stays accurately informed and appropriately concerned about employee relations

____ Professionally manages the compensation and benefits plan

____ Promotes training and development opportunities for employees at all levels of the organization

Add the values from above and enter the subtotal ____ ÷ 5 = ____ score for this category

8. SUPERVISION

- _____ Encourages heads of departments to make decisions within their jurisdictions with minimal city manager involvement, yet maintains general control of operations by providing the right amount of communication to the staff
- _____ Instills confidence and promotes initiative in subordinates through supportive rather than restrictive controls for their programs while still monitoring operations at the department level
- _____ Develops and maintains a friendly and informal relationship with the staff and work force in general, yet maintains the professional dignity of the city manager’s office
- _____ Sustains or improves staff performance by evaluating the performance of staff members at least annually, setting goals and objectives for them, periodically assessing their progress, and providing appropriate feedback
- _____ Encourages teamwork, innovation, and effective problem-solving among the staff members

Add the values from above and enter the subtotal _____ ÷ 5 = _____ score for this category

9. FISCAL MANAGEMENT

- _____ Prepares a balanced budget to provide services at a level directed by council
- _____ Makes the best possible use of available funds, conscious of the need to operate the local government efficiently and effectively
- _____ Prepares a budget and budgetary recommendations in an intelligent and accessible format
- _____ Ensures actions and decisions reflect an appropriate level of responsibility for financial planning and accountability
- _____ Appropriately monitors and manages fiscal activities of the organization

Add the values from above and enter the subtotal _____ ÷ 5 = _____ score for this category

10. COMMUNITY

- _____ Shares responsibility for addressing the difficult issues facing the city
- _____ Avoids unnecessary controversy
- _____ Cooperates with neighboring communities and the county
- _____ Helps the council address future needs and develop adequate plans to address long term trends
- _____ Cooperates with other regional, state and federal government agencies

Add the values from above and enter the subtotal _____ ÷ 5 = _____ score for this category

NARRATIVE EVALUATION

What would you identify as the manager's strength(s), expressed in terms of the principle results achieved during the rating period? _____

What performance area(s) would you identify as most critical for improvement? _____

What constructive suggestions or assistance can you offer the manager to enhance performance? _____

What other comments do you have for the manager; e.g., priorities, expectations, goals or objectives for the new rating period? _____

