

# CITY OF WESTLAKE



## AGENDA

### City Council Special Meeting

Monday, November 02, 2020 at 6:30 PM

Westlake Council Chambers  
4005 Seminole Pratt Whitney Road Westlake, Florida 33470

This meeting shall take place at the **Westlake Community Center/City Council Chambers located at 4005 Seminole Pratt Whitney Road, Westlake, Florida, 33470 and publicly viewed Via Communications Media Technology.**

Members of the public may participate in the meeting through electronic means and may access as follows:

1. Join the Webex meeting from your computer, tablet or smartphone at the following link:

<https://cityofwestlake.my.webex.com/>

Meeting ID: 132 082 7535

Password: hello

2. Participants may also dial in using your phone with any of the following number(s):

United States Toll: +1-408-418-9388

Meeting ID: 132 082 7535

Public Comments will be accepted via an electronic comment card, at least 24 hours prior to the public meeting and also acknowledged during the meeting when participants utilize the "raise your hand" feature during the designated time. Procedures for Public Comment are provided via the City website:

<https://www.westlakegov.com/cityclerk/page/covid-19-public-meetings>

### CITY COUNCIL:

Roger Manning, Mayor  
Katrina Long Robinson, Vice Mayor  
Patric Paul, Council Member – Seat 1  
Kara Crump, Council Member – Seat 2  
JohnPaul O'Connor, Council Member – Seat 3

### CITY STAFF:

Ken Cassel, City Manager  
Pam E. Booker, City Attorney  
Zoie P. Burgess, City Clerk

[TENTATIVE: SUBJECT TO REVISION]

**CALL TO ORDER**

**ROLL CALL**

**PLEDGE OF ALLEGIANCE**

**PUBLIC COMMENTS**

*This section of the agenda allows for comments from the public to speak on any item not presented on the agenda. Each speaker will be given a total of three (3) minutes to comment. A public comment card should be completed and returned to the City Clerk. When you are called to speak, please state your name and address for the record.*

**SPECIAL COUNCIL AGENDA**

- A.** Review of Charter Officers and Council Direction  
**Submitted By:** Administration
- B.** Charter Position Review – City Attorney, Pam E. Booker, Esq.  
**Submitted By:** Zoie Burgess, City Clerk
- C.** Charter Position Review – City Manager, Kenneth Cassel  
**Submitted By:** Zoie Burgess, City Clerk

**CITY COUNCIL COMMENTS**

- A. Councilman JohnPaul O'Connor
- B. Councilwoman Kara Crump
- C. Councilman Patric Paul
- D. Vice Mayor Katrina Long Robinson
- E. Mayor Roger Manning

**CITY ATTORNEY COMMENTS**

**CITY MANAGER COMMENTS**

**PUBLIC COMMENTS**

*This section of the agenda allows for comments from the public to speak on items only presented on the agenda. Each speaker will be given a total of three (3) minutes to comment. A public comment card should be completed and returned to the City Clerk.*

**ADJOURNMENT**

Next Meeting (Subject to Change or be Cancelled): **Regular Council Meeting - November, 9, 2020**

**NOTICE:** If a person, firm or corporation decides to appeal any decision made by the City Council with respect to any matter considered at this meeting, you will need a record of the proceedings, and you may need to ensure that a verbatim record of the proceedings is made, which record includes the testimony and evidence upon which the appeal is to be based. (The above notice is required by State Law. Anyone desiring a verbatim transcript shall have the responsibility, at his own cost, to arrange for the transcript). The City of Westlake does not prepare or provide such verbatim record.

In accordance with the Americans with Disabilities Act, persons who need an accommodation in order to attend or participate in this meeting should contact the City Clerk at (561) 530-5880 at least three (3) business days prior to the meeting in order to request such assistance.

**AGENDA POSTED:** October 27, 2020

**File Attachments for Item:**

Review of Charter Officers and Council Direction

**Submitted By:** Administration





# Meeting Agenda Item Coversheet

<b>MEETING DATE:</b>		11/02/2020	<b>Submitted By:</b> Administration	
<b>SUBJECT:</b> <i>This will be the name of the Item as it will appear on the Agenda</i>		Review of Charter Officers and Council Direction		
<b>STAFF RECOMMENDATION:</b> (MOTION READY)				
<b>SUMMARY and/or JUSTIFICATION:</b>		Provide the City Council with the ability to provide a consensus review of the charter officers and provide goals and objectives for Fiscal year 2020-21. This review will set the baseline upon which the FY 2020-21 year will be measured in August of 2021.		
<b>SELECT, if applicable</b>	<b>AGREEMENT:</b>		<b>BUDGET:</b>	
	<b>STAFF REPORT:</b>		<b>PROCLAMATION:</b>	
	<b>EXHIBIT(S):</b>	X	<b>OTHER:</b>	
<b>IDENTIFY EACH ATTACHMENT.</b> <i>For example, an agreement may have 2 exhibits, identify the agreement and Exhibit A and Exhibit B</i>	Council review documents for City Attorney Council review documents for city Manager Blank review document City Attorney for Council collective review. Blank review document City Manager for Council collective review			
<b>SELECT, if applicable</b>	<b>RESOLUTION:</b>		<b>ORDINANCE:</b>	
<b>IDENTIFY FULL RESOLUTION OR ORDINANCE TITLE</b> <i>(if Item is <u>not</u> a Resolution or Ordinance, please erase all default text from this field's textbox and leave blank)</i> <b><u>Please keep text indented.</u></b>	<Enter Short Resolution/Ordinance Title Here>  <b>&lt;ENTER FULL RESOLUTION/ORDINANCE TITLE HERE&gt;</b>			
<b>FISCAL IMPACT (if any):</b>				\$



# MEMO

**TO:** Mayor and Council  
**FROM:** Ken Cassel, City Manager  
**DATE:** October 26, 2020  
**RE:** Charter Officer Reviews

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As a follow up to the charter officer review memo of October 9, 2020, the proposed process for the November 2, 2020 special meeting is for the City Council to collectively discuss the reviews of each of the Charter Officers and provide their collective review and direction to each Charter Officer individually.

This collective review and direction from the City Council will provide clarity for the direction of the City for the coming year. This review and directions will also provide a base line upon which the Charter Officers and the City Council can monitor the progress of the City for the coming year.

Therefore, there will be a single review developed by the City Council for each Charter Officer allowing the Charter Officer to understand the position of the Council on various areas. The City Clerk will draft the final collective review document for each Charter Officer based on the Council's comments and collective response in the various areas. The final document will be provided to the City Council and each Charter Officer for their reference.

# City of Westlake Attorney Performance Review



## **Purpose of Review**

The purpose of the annual review process of Charter Officer (City Attorney) conducted by the City Council is to:

1. Strengthen the working relationship between the Council and the City Attorney.
2. Provide a mechanism for regular reviews.
3. Identify performance objectives for the City Attorney.
4. Provide feedback to the City Attorney and identify areas where improvements may be needed.

## **Frequency**

The City Council will review the City Attorney annually. The review process will take place during the budget process and will be completed before the adoption of the annual budget.

## **Review Procedure**

The Review procedure is at the will and the direction of the City Council and may be modified at any time. In general, the review process will include the following steps:

1. The City Council shall set the review schedule annually.
2. The Mayor and Council Members shall complete the one-on-one review form and submit to the City Clerk prior to the review meeting.
3. Each Council member shall meet face to face with the City Attorney prior to the special meeting review session.
4. The results of the individual reviews will be placed on the agenda of the special City Council meeting.
5. The performance review, and any subsequent actions, will be placed in the official City Records.
6. The performance review process is not intended to and shall not be constructed as a re-opening or modification of the City Attorney's existing contract.

# City of Westlake Attorney Performance Review



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

Review Period from: \_\_\_\_\_ To: \_\_\_\_\_

Submitted by: \_\_\_\_\_

The following pages define significant areas of responsibility for the City Attorney. In each section, examples of performance and responsibilities are articulated to better explain each subject heading. Please rate the Attorney's performance based on the following categories:

0	<b>Unsatisfactory:</b> Fails to meet all expectations	Performance is well below expectations in all areas of responsibility. Serious performance deficiencies that prohibit adequate performance in the position. Should be evaluated for termination of contract.
1	<b>Poor:</b> Fails to meet most expectations	Performance is well below expectations in most areas of responsibility. Serious performance deficiencies that inhibit adequate performance in the position. Should be evaluated for termination of contract.
2	<b>Fair:</b> Meets most expectations	Often fails to meet performance expectations of the position. Performance is generally adequate but is deficient in one or more key areas and will require improvement.
3	<b>Good:</b> Meets expectations	Meets all expectations of the position and is competent in the performance of responsibilities.
4	<b>Very Good:</b> Meets all expectations	Occasionally exceeds performance expectations of the position. Performs the most difficult parts of the job competently and thoroughly. Contributes significant results on their own initiative. Works with a high level of independence, initiative and concern for the quality of the service produced by the organization.
5	<b>Excellent:</b> Exceeds all expectations	Overall skills and abilities greatly exceed the expectations of the position. Demonstrates strong expertise within key areas of responsibilities. Occasionally receives outstanding results beyond scope of the performance plan in some key areas of responsibility over entire performance period.
6	<b>Outstanding:</b> Far Exceeds all expectations	Overall skills and abilities far exceed all expectations of the position. Demonstrates strong expertise within key areas of responsibilities. Delivers consistently outstanding results beyond scope of the performance plan over entire period. Anticipates needs and executes plans flawlessly.

1. **Communication:** Effectively communicates (orally and in writing) complex issues to government officials, the press and the public where diverse viewpoints and goals exist. Ensures that Council members receive important information in a timely and effective manner. Presents the Council and community with clear and accurate written reports and correspondence. Responds to correspondence, requests and complaints quickly and appropriately. Facilitates open two-way communication and encourages mutual honesty and respect with the community, Council, City Manager, and staff.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent \_\_\_\_\_ 4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

2. **Job Knowledge:** Possesses and applies a comprehensive understanding and knowledge of the City Charter, Code of Ordinances, Code of Ethics and Florida Statutes. Applies effective litigation skills before trial and appellate level courts and administrative agencies. Has an extensive understanding of legal issues faced by local governments. Has the ability to effectively formulate and advance legal strategies that further the goals of the City.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent \_\_\_\_\_ 4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

3. **Professionalism:** Deals effectively and appropriately with the public and other organizations. Devotes time and energy to the job. Demonstrates high ethical standards in the organization. Works to keep politics and personal perspectives out of the decision-making process. Stays active in professional organizations.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent \_\_\_\_\_ 4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

4. **Management:** Effective in the management, supervisory and interpersonal skills in the context of both a law office and organization, including the ability to establish and maintain effective working relationships with City Manager, City Council, Contract Departments, other government officials, boards and committees, and the general public. Creates a collaborative, team building, environment. Recognizes the accomplishments of contract staff and other agencies working on behalf of the City. Supports professional growth and opportunity within the organization. Accepts full accountability for staff and the outcome of City projects or decisions. Identifies organizational problems and takes remedial action.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent \_\_\_\_\_ 4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

4. **Relationship with Council:** Demonstrates a positive and trusting relationship with Council, both as a group and individually, by acting as an advisor to them on legal issues as they arise.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent \_\_\_\_\_ 4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair

\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

5. **Relationship with the Community:** Understands general community issues and concerns. Remains involved and active in the community, represents the City well and in a professional and positive manner. Works effectively with the media and press, community organizations and other agencies.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent \_\_\_\_\_ 4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair

\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

6. **Relationship with City Manager and Department Heads:** Demonstrates a positive legal consultative relationship with the City Manager and Department Heads in their pursuit of meeting the goals and objectives of the City.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent \_\_\_\_\_ 4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair

\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

7. **Completion of Work:** Completes work assignments within reasonable or set time frames. (In this context, "reasonable" means a time frame which is acceptable to Council in terms of their priorities, and in consideration of the attorney's ongoing workload.)

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent \_\_\_\_\_ 4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair

\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

**Achievements:** Identify a few of the top achievements or strong points you observed in the City Attorney over the past year.

Comments:

**Objectives:** List two-to-three performance objectives that you feel are important for the City Attorney to work on for the coming year.

Comments:



# City of Westlake Manager Performance Review



## **Purpose of Review**

The purpose of the annual review process of Charter Officer (City Manager) conducted by the City Council to:

1. Strengthen the working relationship between the Council and the City Manager.
2. Provide a mechanism for regular reviews.
3. Identify performance objectives for the City Manager.
4. Provide feedback to the City Manager and identify areas where improvements may be needed.

## **Frequency**

The City Council will review the City Manager annually. The review process will take place during the budget process and will be completed before the adoption of the annual budget.

## **Review Procedure**

The Review procedure remains at the will and the direction of the City Council and may be modified at any time. In general, the review process will include the following steps:

1. The City Council shall set the review schedule annually.
2. The Mayor and Council Members shall complete the review form and submit to the City Clerk prior to the review meeting.
3. Each Council member shall meet face to face with the City Manager prior to the special meeting review session.
4. The results of the individual reviews will be placed on the agenda of the special City Council meeting.
5. The performance review, and any subsequent actions, will be placed in the official City Records.
6. The performance review process is not intended to and shall not be constructed as a re-opening or modification of the City Manager's existing contract.

# City of Westlake Manager Performance Review



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

Review Period from: \_\_\_\_\_ To: \_\_\_\_\_

Submitted by: \_\_\_\_\_

The following pages define significant areas of responsibility for the City Manager. In each section, examples of performance and responsibilities are articulated to better explain each subject heading. Please rate the Manager's performance based on the following categories:

0	<b>Unsatisfactory:</b> Fails to meet all expectations	Performance is well below expectations in all areas of responsibility. Serious performance deficiencies that prohibit adequate performance in the position. Should be evaluated for termination of contract.
1	<b>Poor:</b> Fails to meet most expectations	Performance is well below expectations in most areas of responsibility. Serious performance deficiencies that inhibit adequate performance in the position. Should be evaluated for termination of contract.
2	<b>Fair:</b> Meets most expectations	Often fails to meet performance expectations of the position. Performance is generally adequate but is deficient in one or more key areas and will require improvement.
3	<b>Good:</b> Meets expectations	Meets all expectations of the position and is competent in the performance of responsibilities.
4	<b>Very Good:</b> Meets all expectations	Occasionally exceeds performance expectations of the position. Performs the most difficult parts of the job competently and thoroughly. Contributes significant results on their own initiative. Works with a high level of independence, initiative and concern for the quality of the service produced by the organization.
5	<b>Excellent:</b> Exceeds all expectations	Overall skills and abilities greatly exceed the expectations of the position. Demonstrates strong expertise within key areas of responsibilities. Occasionally receives outstanding results beyond scope of the performance plan in some key areas of responsibility over entire performance period.
6	<b>Outstanding:</b> Far Exceeds all expectations	Overall skills and abilities far exceed all expectations of the position. Demonstrates strong expertise within key areas of responsibilities. Delivers consistently outstanding results beyond scope of the performance plan over entire period. Anticipates needs and executes plans flawlessly.

**1. Management of the Organization:** Effectively runs the operations of the organization. Creates a collaborative, team building, environment for contract staff. Recognizes the accomplishments of contract staff and other agencies working on behalf of the City. Supports professional growth and opportunity within the organization. Accepts full accountability for staff and the outcome of City projects or decisions. Identifies organizational problems and takes remedial action.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent \_\_\_\_\_ 4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair

\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

**2. Execution of Policy:** Understands and complies with policies and procedures governing the City. Implements City policy fairly and consistently based upon Council decisions, goals, and applicable laws and regulations. Works towards accomplishing identified Council goals. Presents matters in a factual, analytical way. Coordinates Council policy decisions to staff, departments, other organizations, and the community.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent \_\_\_\_\_ 4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair

\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

**3. Financial Management:** Properly prepares and manages the budget. Demonstrates ingenuity in approaching budgetary matters including long range revenues and expenditures for the organization.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent \_\_\_\_\_ 4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

**4. Relationship with Council:** Provides regular updates to the Council keeping them informed about current and critical issues. Makes effort to be accessible to Council Members. Handles issues brought by the Council in a consistent and timely manner. Maintains an honest approach to new ideas, issues, and complaints raised by Council Members.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent \_\_\_\_\_ 4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

5. **Community Relationships:** Makes an effort to understand general community issues and concerns. Remains involved and active in the community, represents the City well and in a professional .and positive manner. Works proactively with the media and press. Works effectively with community organizations and other agencies. Educates the community on the City goals and services

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent \_\_\_\_\_ 4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair

\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

6. **Communication:** Insures that Council Members receive important information in a timely and effective manner. Presents the Council and community with clear and accurate written reports and correspondence. Responds to correspondence, requests, and complaints quickly and appropriately. Facilitates open two-way communication and encourages mutual honesty and respect with the community, Council, and contract staff.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent \_\_\_\_\_ 4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair

\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

**7. Leadership:** Provides the Council and the organization with real solutions and creative alternatives to issues and problems. Anticipates and responds to issues. Assures that Council decisions are thought out, objective, and consistent with past practices, and are legal and ethical. Makes use of sound administrative practices. Leads the organization through effective management of people and tasks.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent \_\_\_\_\_ 4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

**8. Professionalism:** Deals effectively and appropriately with the public and other organizations. Devotes time and energy to the job. Demonstrates high ethical standards in the organization. Works to keep "politics", and personal perspectives out of the decision-making process. Stays active in professional organizations and regional issues.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent \_\_\_\_\_ 4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

**Achievements:** Identify a few of the top achievements or strong points you observed in the City Manager over the past year.

Comments:

**Objectives:** List two-to-three performance objectives that you feel are important for the City Manager to work on for the coming year.

Comments:

**File Attachments for Item:**

B. Charter Position Review – City Attorney, Pam E. Booker, Esq.

**Submitted By:** Zoie Burgess, City Clerk





# Meeting Agenda Item Coversheet

<b>MEETING DATE:</b>		11/02/2020	<b>Submitted By:</b> Zoie Burgess, City Clerk	
<b>SUBJECT:</b> <i>This will be the name of the Item as it will appear on the Agenda</i>		Charter Position Review – City Attorney, Pam E. Booker, Esq.		
<b>STAFF RECOMMENDATION:</b> (MOTION READY)				
<b>SUMMARY and/or JUSTIFICATION:</b>		<p>Upon Council’s direction, it was requested that a process be implemented to evaluate the Charter officers – City Attorney and City Manager. An evaluation tool was provided to each Council member on October 9<sup>th</sup> for both positions and an open invitation to conduct one-on-one reviews with each charter officer, which would be publicly discussed at a Special Council Meeting.</p> <p>At the Special Council Meeting, Council will have the opportunity to discuss the submitted evaluations, providing a review of past performance and any guidance for improvement, directives, and initiatives for future City activity.</p>		
<b>SELECT, if applicable</b>	<b>AGREEMENT:</b>		<b>BUDGET:</b>	
	<b>STAFF REPORT:</b>		<b>PROCLAMATION:</b>	
	<b>EXHIBIT(S):</b>		<b>OTHER:</b>	
<b>IDENTIFY EACH ATTACHMENT.</b> <i>For example, an agreement may have 2 exhibits, identify the agreement and Exhibit A and Exhibit B</i>				
<b>SELECT, if applicable</b>	<b>RESOLUTION:</b>		<b>ORDINANCE:</b>	
<b>IDENTIFY FULL RESOLUTION OR ORDINANCE TITLE</b> <i>(if Item is <b>not</b> a Resolution or Ordinance, please erase all default text from this field’s textbox and leave blank)</i> <b><u>Please keep text indented.</u></b>				
<b>FISCAL IMPACT (if any):</b>				\$

# City of Westlake Attorney Performance Review



Date: October 26, 2020

Review Period from: June 16, 2016 To: October 25, 2020

Submitted by: Councilwoman Kara Crump

The following pages define significant areas of responsibility for the City Attorney. In each section, examples of performance and responsibilities are articulated to better explain each subject heading. Please rate the Attorney's performance based on the following categories:

0	<b>Unsatisfactory:</b> Fails to meet all expectations	Performance is well below expectations in all areas of responsibility. Serious performance deficiencies that prohibit adequate performance in the position. Should be evaluated for termination of contract.
1	<b>Poor:</b> Fails to meet most expectations	Performance is well below expectations in most areas of responsibility. Serious performance deficiencies that inhibit adequate performance in the position. Should be evaluated for termination of contract.
2	<b>Fair:</b> Meets most expectations	Often fails to meet performance expectations of the position. Performance is generally adequate but is deficient in one or more key areas and will require improvement.
3	<b>Good:</b> Meets expectations	Meets all expectations of the position and is competent in the performance of responsibilities.
4	<b>Very Good:</b> Meets all expectations	Occasionally exceeds performance expectations of the position. Performs the most difficult parts of the job competently and thoroughly. Contributes significant results on their own initiative. Works with a high level of independence, initiative and concern for the quality of the service produced by the organization.
5	<b>Excellent:</b> Exceeds all expectations	Overall skills and abilities greatly exceed the expectations of the position. Demonstrates strong expertise within key areas of responsibilities. Occasionally receives outstanding results beyond scope of the performance plan in some key areas of responsibility over entire performance period.
6	<b>Outstanding:</b> Far Exceeds all expectations	Overall skills and abilities far exceed all expectations of the position. Demonstrates strong expertise within key areas of responsibilities. Delivers consistently outstanding results beyond scope of the performance plan over entire period. Anticipates needs and executes plans flawlessly.

1. **Communication:** Effectively communicates (orally and in writing) complex issues to government officials, the press and the public where diverse viewpoints and goals exist. Ensures that Council members receive important information in a timely and effective manner. Presents the Council and community with clear and accurate written reports and correspondence. Responds to correspondence, requests and complaints quickly and appropriately. Facilitates open two-way communication and encourages mutual honesty and respect with the community, Council, City Manager, and staff.

\_\_\_\_ 6-Outstanding \_\_\_\_ 5-Excellent \_\_\_\_ 4-Very Good \_\_\_\_ 3-Good \_\_\_X\_\_\_ 2-Fair  
\_\_\_\_ 1-Poor \_\_\_\_ 0-Unsatisfactory

**Comments:**

**There have been a couple of meetings where the agenda briefing by the City Attorney changed to be more about the conflict between the City Manager . I would like to see better communication between the City Attorney and City Manager.**

2. **Job Knowledge:** Possesses and applies a comprehensive understanding and knowledge of the City Charter, Code of Ordinances, Code of Ethics and Florida Statutes. Applies effective litigation skills before trial and appellate level courts and administrative agencies. Has an extensive understanding of legal issues faced by local governments. Has the ability to effectively formulate and advance legal strategies that further the goals of the City.

\_\_\_\_ 6-Outstanding \_\_\_\_ 5-Excellent \_\_\_\_ 4-Very Good \_\_\_\_ 3-Good \_\_\_X\_\_\_ 2-Fair  
\_\_\_\_ 1-Poor \_\_\_\_ 0-Unsatisfactory

**Comments:**

**I have become very confused by the advice being presented to the Council. Items that were once clear now seem to be clouded with a lot of confusion and controversy. The City Attorney usually presents legal items with clarity and that is a strength.**

3. **Professionalism:** Deals effectively and appropriately with the public and other organizations. Devotes time and energy to the job. Demonstrates high ethical standards in the organization. Works to keep politics and personal perspectives out of the decision-making process. Stays active in professional organizations.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent \_\_\_\_\_ 4-Very Good  3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

**The City Attorney has done a good job representing the City in public meetings and other organizations. I would like improvements to keep personal perspectives out of the decision making process.**

4. **Management:** Effective in the management, supervisory and interpersonal skills in the context of both a law office and organization, including the ability to establish and maintain effective working relationships with City Manager, City Council, Contract Departments, other government officials, boards and committees, and the general public. Creates a collaborative, team building, environment. Recognizes the accomplishments of contract staff and other agencies working on behalf of the City. Supports professional growth and opportunity within the organization. Accepts full accountability for staff and the outcome of City projects or decisions. Identifies organizational problems and takes remedial action.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent \_\_\_\_\_ 4-Very Good  3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

**The City Attorney needs improvement to build teamwork within the city administration.**



4. **Relationship with Council:** Demonstrates a positive and trusting relationship with Council, both as a group and individually, by acting as an advisor to them on legal issues as they arise. \_\_\_\_\_

6-Outstanding \_\_\_\_\_ 5-Excellent \_\_\_\_\_ 4-Very Good  3-Good \_\_\_\_\_ 2-Fair \_\_\_\_\_  
1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

**The relationship with the City Attorney has been good with me.**

5. **Relationship with the Community:** Understands general community issues and concerns. Remains involved and active in the community, represents the City well and in a professional and positive manner. Works effectively with the media and press, community organizations and other agencies.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent  4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair \_\_\_\_\_  
1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

**The City Attorney has always made a good effort to have good relationships with the residents and other members of the public.**

6. **Relationship with City Manager and Department Heads:** Demonstrates a positive legal consultative relationship with the City Manager and Department Heads in their pursuit of meeting the goals and objectives of the City.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent \_\_\_\_\_ 4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair \_\_\_\_\_  
 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

**I feel recently the relationship between the City Attorney and City Manager has become unprofessional. This appears to maybe be creating a difficult working environment that could harm the city moving forward.**

7. **Completion of Work:** Completes work assignments within reasonable or set time frames. (In this context, "reasonable" means a time frame which is acceptable to Council in terms of their priorities, and in consideration of the attorney's ongoing workload.)

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent \_\_\_\_\_ 4-Very Good **X** 3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

**The City Attorney does a good job at meeting the council priorities. However, I would like to make sure that mistakes are not made like the Ordinance issues with the election occur again.**

**Achievements:** Identify a few of the top achievements or strong points you observed in the City Attorney over the past year.

**Comments:**

**The City Attorney is professional with the public and representing the City in organizations and has built good relationships with the Council.**

**Objectives:** List two-to-three performance objectives that you feel are important for the City Attorney to work on for the coming year.

**Comments:**

**THE CITY ATTORNEY NEEDS TO IMPROVE HER RELATIONSHIP WITH THE CITY MANAGER**

**Need to seek resolution of issues before bringing items to the City Council**

# City of Westlake Attorney Performance Review



## **Purpose of Review**

The purpose of the annual review process of Charter Officer (City Attorney) conducted by the City Council is to:

1. Strengthen the working relationship between the Council and the City Attorney.
2. Provide a mechanism for regular reviews.
3. Identify performance objectives for the City Attorney.
4. Provide feedback to the City Attorney and identify areas where improvements may be needed.

## **Frequency**

The City Council will review the City Attorney annually. The review process will take place during the budget process and will be completed before the adoption of the annual budget.

## **Review Procedure**

The Review procedure is at the will and the direction of the City Council and may be modified at any time. In general, the review process will include the following steps:

1. The City Council shall set the review schedule annually.
2. The Mayor and Council Members shall complete the one-on-one review form and submit to the City Clerk prior to the review meeting.
3. Each Council member shall meet face to face with the City Attorney prior to the special meeting review session.
4. The results of the individual reviews will be placed on the agenda of the special City Council meeting.
5. The performance review, and any subsequent actions, will be placed in the official City Records.
6. The performance review process is not intended to and shall not be constructed as a re-opening or modification of the City Attorney's existing contract.

# City of Westlake Attorney Performance Review



Date: 10/26/2020

Review Period from: 4/2020 To: 10/2020

Submitted by: Councilman Patric Paul

The following pages define significant areas of responsibility for the City Attorney. In each section, examples of performance and responsibilities are articulated to better explain each subject heading. Please rate the Attorney's performance based on the following categories:

0	<b>Unsatisfactory:</b> Fails to meet all expectations	Performance is well below expectations in all areas of responsibility. Serious performance deficiencies that prohibit adequate performance in the position. Should be evaluated for termination of contract.
1	<b>Poor:</b> Fails to meet most expectations	Performance is well below expectations in most areas of responsibility. Serious performance deficiencies that inhibit adequate performance in the position. Should be evaluated for termination of contract.
2	<b>Fair:</b> Meets most expectations	Often fails to meet performance expectations of the position. Performance is generally adequate but is deficient in one or more key areas and will require improvement.
3	<b>Good:</b> Meets expectations	Meets all expectations of the position and is competent in the performance of responsibilities.
4	<b>Very Good:</b> Meets all expectations	Occasionally exceeds performance expectations of the position. Performs the most difficult parts of the job competently and thoroughly. Contributes significant results on their own initiative. Works with a high level of independence, initiative and concern for the quality of the service produced by the organization.
5	<b>Excellent:</b> Exceeds all expectations	Overall skills and abilities greatly exceed the expectations of the position. Demonstrates strong expertise within key areas of responsibilities. Occasionally receives outstanding results beyond scope of the performance plan in some key areas of responsibility over entire performance period.
6	<b>Outstanding:</b> Far Exceeds all expectations	Overall skills and abilities far exceed all expectations of the position. Demonstrates strong expertise within key areas of responsibilities. Delivers consistently outstanding results beyond scope of the performance plan over entire period. Anticipates needs and executes plans flawlessly.



1. **Communication:** Effectively communicates (orally and in writing) complex issues to government officials, the press and the public where diverse viewpoints and goals exist. Ensures that Council members receive important information in a timely and effective manner. Presents the Council and community with clear and accurate written reports and correspondence. Responds to correspondence, requests and complaints quickly and appropriately. Facilitates open two-way communication and encourages mutual honesty and respect with the community, Council, City Manager, and staff.

6-Outstanding     5-Excellent     4-Very Good     3-Good     2-Fair  
 1-Poor     0-Unsatisfactory

**Comments:** Ms. Booker has been very transparent and reliable in explaining pending legal issues in a timely manner. She explains in terms of what is always in the best interest of the City of Westlake. She provides information in manner that provides council members the opportunity to make intelligent decisions.

2. **Job Knowledge:** Possesses and applies a comprehensive understanding and knowledge of the City Charter, Code of Ordinances, Code of Ethics and Florida Statutes. Applies effective litigation skills before trial and appellate level courts and administrative agencies. Has an extensive understanding of legal issues faced by local governments. Has the ability to effectively formulate and advance legal strategies that further the goals of the City.

6-Outstanding     5-Excellent     4-Very Good     3-Good     2-Fair  
 1-Poor     0-Unsatisfactory

**Comments:** Ms. Booker has demonstrated on many occasions that she is extremely competent in her role as City Attorney. She has extensive knowledge of all legal matters relevant to the operation of a city.

3. **Professionalism:** Deals effectively and appropriately with the public and other organizations. Devotes time and energy to the job. Demonstrates high ethical standards in the organization. Works to keep politics and personal perspectives out of the decision-making process. Stays active in professional organizations.

\_\_\_\_\_ 6-Outstanding  5-Excellent \_\_\_\_\_ 4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:** Ms. Booker conducts herself in a professional manner. She is able to keep her composure in extremely challenging situations.

4. **Management:** Effective in the management, supervisory and interpersonal skills in the context of both a law office and organization, including the ability to establish and maintain effective working relationships with City Manager, City Council, Contract Departments, other government officials, boards and committees, and the general public. Creates a collaborative, team building, environment. Recognizes the accomplishments of contract staff and other agencies working on behalf of the City. Supports professional growth and opportunity within the organization. Accepts full accountability for staff and the outcome of City projects or decisions. Identifies organizational problems and takes remedial action.

\_\_\_\_\_ 6-Outstanding  5-Excellent \_\_\_\_\_ 4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:** Ms. Booker works very diligently to find a compromise on very challenging situations. She has kept the best interest of the City of Westlake in plain view.

4. **Relationship with Council:** Demonstrates a positive and trusting relationship with Council, both as a group and individually, by acting as an advisor to them on legal issues as they arise.

6-Outstanding     5-Excellent     4-Very Good     3-Good     2-Fair  
 1-Poor     0-Unsatisfactory

**Comments:** Ms. Booker does an outstanding job in managing relationships with all the council members. She explains all legal matters in a very concise manner.

5. **Relationship with the Community:** Understands general community issues and concerns. Remains involved and active in the community, represents the City well and in a professional and positive manner. Works effectively with the media and press, community organizations and other agencies.

6-Outstanding     5-Excellent     4-Very Good     3-Good     2-Fair  
 1-Poor     0-Unsatisfactory

**Comments:**

6. **Relationship with City Manager and Department Heads:** Demonstrates a positive legal consultative relationship with the City Manager and Department Heads in their pursuit of meeting the goals and objectives of the City.

6-Outstanding     5-Excellent     4-Very Good     3-Good     2-Fair  
 1-Poor     0-Unsatisfactory

**Comments:** There is oftentimes friction within the city staff, but Ms. Booker does a great job in working to resolve any issues.

7. **Completion of Work:** Completes work assignments within reasonable or set time frames. (In this context, "reasonable" means a time frame which is acceptable to Council in terms of their priorities, and in consideration of the attorney's ongoing workload.)

6-Outstanding     5-Excellent     4-Very Good     3-Good     2-Fair  
 1-Poor     0-Unsatisfactory

**Comments:** The council has always been provided with information in a timely manner. She does a great job in keeping council members updated for every meeting.

**Achievements:** Identify a few of the top achievements or strong points you observed in the City Attorney over the past year.

- Comments:
1. Ms. Booker has gone above and beyond to inform Council of any legal issues regarding the City of Westlake.
  2. She has been very vigilant in her oversight of City Ordinances.

**Objectives:** List two-to-three performance objectives that you feel are important for the City Attorney to work on for the coming year.

Comments: Please work on better communication with Seminole Improvement District.

# City of Westlake Attorney Performance Review



## **Purpose of Review**

The purpose of the annual review process of Charter Officer (City Attorney) conducted by the City Council is to:

1. Strengthen the working relationship between the Council and the City Attorney.
2. Provide a mechanism for regular reviews.
3. Identify performance objectives for the City Attorney.
4. Provide feedback to the City Attorney and identify areas where improvements may be needed.

## **Frequency**

The City Council will review the City Attorney annually. The review process will take place during the budget process and will be completed before the adoption of the annual budget.

## **Review Procedure**

The Review procedure is at the will and the direction of the City Council and may be modified at any time. In general, the review process will include the following steps:

1. The City Council shall set the review schedule annually.
2. The Mayor and Council Members shall complete the one-on-one review form and submit to the City Clerk prior to the review meeting.
3. Each Council member shall meet face to face with the City Attorney prior to the special meeting review session.
4. The results of the individual reviews will be placed on the agenda of the special City Council meeting.
5. The performance review, and any subsequent actions, will be placed in the official City Records.
6. The performance review process is not intended to and shall not be constructed as a re-opening or modification of the City Attorney's existing contract.

# City of Westlake Attorney Performance Review



**Date:** 10-26-2020

**Review Period from:** April 2020 **To:** 10-26-2020

**Submitted by:** JohnPaul O'Connor Councilman Seat 3

The following pages define significant areas of responsibility for the City Attorney. In each section, examples of performance and responsibilities are articulated to better explain each subject heading. Please rate the Attorney's performance based on the following categories:

0	<b>Unsatisfactory:</b> Fails to meet all expectations	Performance is well below expectations in all areas of responsibility. Serious performance deficiencies that prohibit adequate performance in the position. Should be evaluated for termination of contract.
1	<b>Poor:</b> Fails to meet most expectations	Performance is well below expectations in most areas of responsibility. Serious performance deficiencies that inhibit adequate performance in the position. Should be evaluated for termination of contract.
2	<b>Fair:</b> Meets most expectations	Often fails to meet performance expectations of the position. Performance is generally adequate but is deficient in one or more key areas and will require improvement.
3	<b>Good:</b> Meets expectations	Meets all expectations of the position and is competent in the performance of responsibilities.
4	<b>Very Good:</b> Meets all expectations	Occasionally exceeds performance expectations of the position. Performs the most difficult parts of the job competently and thoroughly. Contributes significant results on their own initiative. Works with a high level of independence, initiative and concern for the quality of the service produced by the organization.
5	<b>Excellent:</b> Exceeds all expectations	Overall skills and abilities greatly exceed the expectations of the position. Demonstrates strong expertise within key areas of responsibilities. Occasionally receives outstanding results beyond scope of the performance plan in some key areas of responsibility over entire performance period.
6	<b>Outstanding:</b> Far Exceeds all expectations	Overall skills and abilities far exceed all expectations of the position. Demonstrates strong expertise within key areas of responsibilities. Delivers consistently outstanding results beyond scope of the performance plan over entire period. Anticipates needs and executes plans flawlessly.

1. **Communication:** Effectively communicates (orally and in writing) complex issues to government officials, the press and the public where diverse viewpoints and goals exist. Ensures that Council members receive important information in a timely and effective manner. Presents the Council and community with clear and accurate written reports and correspondence. Responds to correspondence, requests and complaints quickly and appropriately. Facilitates open two-way communication and encourages mutual honesty and respect with the community, Council, City Manager, and staff.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent  4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

Ms. Booker communicates effectively with me. There is always room for improvement.

2. **Job Knowledge:** Possesses and applies a comprehensive understanding and knowledge of the City Charter, Code of Ordinances, Code of Ethics and Florida Statutes. Applies effective litigation skills before trial and appellate level courts and administrative agencies. Has an extensive understanding of legal issues faced by local governments. Has the ability to effectively formulate and advance legal strategies that further the goals of the City.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent \_\_\_\_\_ 4-Very Good  3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

Ms. Booker is by all accounts is a knowledgeable and capable jurist and counselor. However I have observed some procedural inconsistencies where she has failed to properly advise council in regards to procedure at crucial times. Furthermore we have had to have some matters brought before the council after the fact in order to cure the appearance of any potential sunshine violations.

3. **Professionalism:** Deals effectively and appropriately with the public and other organizations. Devotes time and energy to the job. Demonstrates high ethical standards in the organization. Works to keep politics and personal perspectives out of the decision-making process. Stays active in professional organizations.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent   x   4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

The above is broken into five key points. I would say the City Attorney excels at three out of the five key points. There is much room for improvement in the other two.

4. **Management:** Effective in the management, supervisory and interpersonal skills in the context of both a law office and organization, including the ability to establish and maintain effective working relationships with City Manager, City Council, Contract Departments, other government officials, boards and committees, and the general public. Creates a collaborative, team building, environment. Recognizes the accomplishments of contract staff and other agencies working on behalf of the City. Supports professional growth and opportunity within the organization. Accepts full accountability for staff and the outcome of City projects or decisions. Identifies organizational problems and takes remedial action.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent \_\_\_\_\_ 4-Very Good   x   3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

I feel there is miles of room for improvement here. Ms Booker appears to be at the center of every contentious issue and controversy Involving The City Manager, permit applicants, special district, land owners etc...



4. **Relationship with Council:** Demonstrates a positive and trusting relationship with Council, both as a group and individually, by acting as an advisor to them on legal issues as they arise.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent   x   4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

By all accounts Ms. Bookers relationship with me is very good and it appears she has a great relationship with the rest of council.

5. **Relationship with the Community:** Understands general community issues and concerns. Remains involved and active in the community, represents the City well and in a professional and positive manner. Works effectively with the media and press, community organizations and other agencies.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent \_\_\_\_\_ 4-Very Good   x   3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

City Attorney actually lives in the City Of Westlake, and is highly involved in community outreach at the county level. In regards to working effectively with media and press I was disheartened to hear that when floated a couple questions from press, the City Attorney responded stating she "would look into it" but then ultimately failed to respond entirely.

6. **Relationship with City Manager and Department Heads:** Demonstrates a positive legal consultative relationship with the City Manager and Department Heads in their pursuit of meeting the goals and objectives of the City.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent \_\_\_\_\_ 4-Very Good \_\_\_\_\_ 3-Good   x   2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

Relationships with department heads appears to be adequate with the exception of the City Manager. Ms. Bookers relationship with The City manager is presented to be contentious and even caprecious at times. If this question was broken down into two parts I would absolutely have to rate relationship with City Manager as 0-Unsatisfactory

7. **Completion of Work:** Completes work assignments within reasonable or set time frames. (In this context, "reasonable" means a time frame which is acceptable to Council in terms of their priorities, and in consideration of the attorney's ongoing workload.)

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent   x   4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

City Attorney has stated to me that she has never missed a deadline and usually has work uploaded well ahead of the deadline. I do have concerns with the size of the legal budget and the implementation of outside council. For instance Ms. Booker engaged outside counsel and we individually sat through an hour long presentation by outside counsel only to have to again sit through the exact same presentation as a group on the dais . I feel we could have benefited from sitting through the presentation as a group the first time. perhaps some of my questions were not thought of by my colleagues on the council and vice versa. We simply perform better as a group. Not to mention the money the city would have saved with a single presentation Vs Six. Ms. Booker reconciles the size of her budget with the fact that the city has "100% of her attention and resources" as our full time city attorney. and that her Budget amount includes normal benefits provided such as Health Insurance and

**Achievements:** Identify a few of the top achievements or strong points you observed in the City Attorney over the past year.

**Comments:**

Ive observed the passing of ordinances as achievements.  
However, I was actually really disappointed here. In my private interview with Ms. Booker she couldn't identify in the last 12 months a single item she would call a "Top Achievement". There were many items that were still ongoing or future objectives but not a single "great achievement to reference"

**Objectives:** List two-to-three performance objectives that you feel are important for the City Attorney to work on for the coming year.

**Comments:**

Top objective is, I would like to see a dynamic shift in Ms. Bookers relationship with the City Manager. The "in-fighting" between departments I feel is extremely counter productive to the City's health and prosperity.

Another objective is Id like to see the City Attorneys focus shift away from drafting or influencing policy and narrow to legal counsel alone. For example when I asked Ms. Booker what her "Top Objective" was for next year she said and I quote "In regards to the HAPPY program I would like that all the developers have home inventory available in the 250k-300K price range to assist home buyers with our down payment assistance program". As valiant as that effort may be I do not believe that it should be the City attorney's focus, let alone her top objective. The policy and direction the city takes in regards to the happy program should come solely at the direction of council.

# City of Westlake Attorney Performance Review



Date: 10/26/2020

Review Period from: 2016 To: 2020

Submitted by: Katrina Long Robinson - Seat 4

The following pages define significant areas of responsibility for the City Attorney. In each section, examples of performance and responsibilities are articulated to better explain each subject heading. Please rate the Attorney's performance based on the following categories:

0	<b>Unsatisfactory:</b> Fails to meet all expectations	Performance is well below expectations in all areas of responsibility. Serious performance deficiencies that prohibit adequate performance in the position. Should be evaluated for termination of contract.
1	<b>Poor:</b> Fails to meet most expectations	Performance is well below expectations in most areas of responsibility. Serious performance deficiencies that inhibit adequate performance in the position. Should be evaluated for termination of contract.
2	<b>Fair:</b> Meets most expectations	Often fails to meet performance expectations of the position. Performance is generally adequate but is deficient in one or more key areas and will require improvement.
3	<b>Good:</b> Meets expectations	Meets all expectations of the position and is competent in the performance of responsibilities.
4	<b>Very Good:</b> Meets all expectations	Occasionally exceeds performance expectations of the position. Performs the most difficult parts of the job competently and thoroughly. Contributes significant results on their own initiative. Works with a high level of independence, initiative and concern for the quality of the service produced by the organization.
5	<b>Excellent:</b> Exceeds all expectations	Overall skills and abilities greatly exceed the expectations of the position. Demonstrates strong expertise within key areas of responsibilities. Occasionally receives outstanding results beyond scope of the performance plan in some key areas of responsibility over entire performance period.
6	<b>Outstanding:</b> Far Exceeds all expectations	Overall skills and abilities far exceed all expectations of the position. Demonstrates strong expertise within key areas of responsibilities. Delivers consistently outstanding results beyond scope of the performance plan over entire period. Anticipates needs and executes plans flawlessly.



# City of Westlake Attorney Performance Review



## Purpose of Review

The purpose of the annual review process of Charter Officer (City Attorney) conducted by the City Council is to:

1. Strengthen the working relationship between the Council and the City Attorney.
2. Provide a mechanism for regular reviews.
3. Identify performance objectives for the City Attorney.
4. Provide feedback to the City Attorney and identify areas where improvements may be needed.

## Frequency

The City Council will review the City Attorney annually. The review process will take place during the budget process and will be completed before the adoption of the annual budget.

## Review Procedure

The Review procedure is at the will and the direction of the City Council and may be modified at any time. In general, the review process will include the following steps:

1. The City Council shall set the review schedule annually.
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5. The performance review, and any subsequent actions, will be placed in the official City Records.
6. The performance review process is not intended to and shall not be constructed as a re-opening or modification of the City Attorney's existing contract.

1. **Communication:** Effectively communicates (orally and in writing) complex issues to government officials, the press and the public where diverse viewpoints and goals exist. Ensures that Council members receive important information in a timely and effective manner. Presents the Council and community with clear and accurate written reports and correspondence. Responds to correspondence, requests and complaints quickly and appropriately. Facilitates open two-way communication and encourages mutual honesty and respect with the community, Council, City Manager, and staff.

\_\_\_ 6-Outstanding \_\_\_ 5-Excellent \_\_\_ 4-Very Good \_\_\_ 3-Good \_\_\_ 2-Fair  
\_\_\_ 1-Poor \_\_\_ 0-Unsatisfactory

**Comments:**

2. **Job Knowledge:** Possesses and applies a comprehensive understanding and knowledge of the City Charter, Code of Ordinances, Code of Ethics and Florida Statutes. Applies effective litigation skills before trial and appellate level courts and administrative agencies. Has an extensive understanding of legal issues faced by local governments. Has the ability to effectively formulate and advance legal strategies that further the goals of the City.

\_\_\_ 6-Outstanding \_\_\_ 5-Excellent \_\_\_ 4-Very Good \_\_\_ 3-Good \_\_\_ 2-Fair  
\_\_\_ 1-Poor \_\_\_ 0-Unsatisfactory

**Comments:**



3. **Professionalism:** Deals effectively and appropriately with the public and other organizations. Devotes time and energy to the job. Demonstrates high ethical standards in the organization. Works to keep politics and personal perspectives out of the decision-making process. Stays active in professional organizations.

\_\_\_\_ 6-Outstanding \_\_\_\_ 5-Excellent \_\_\_\_ 4-Very Good \_\_\_\_ 3-Good \_\_\_\_ 2-Fair  
\_\_\_\_ 1-Poor \_\_\_\_ 0-Unsatisfactory

Comments:

4. **Management:** Effective in the management, supervisory and interpersonal skills in the context of both a law office and organization, including the ability to establish and maintain effective working relationships with City Manager, City Council, Contract Departments, other government officials, boards and committees, and the general public. Creates a collaborative, team building, environment. Recognizes the accomplishments of contract staff and other agencies working on behalf of the City. Supports professional growth and opportunity within the organization. Accepts full accountability for staff and the outcome of City projects or decisions. Identifies organizational problems and takes remedial action.

\_\_\_\_ 6-Outstanding \_\_\_\_ 5-Excellent \_\_\_\_ 4-Very Good \_\_\_\_ 3-Good \_\_\_\_ 2-Fair  
\_\_\_\_ 1-Poor \_\_\_\_ 0-Unsatisfactory

Comments:

4. **Relationship with Council:** Demonstrates a positive and trusting relationship with Council, both as a group and individually, by acting as an advisor to them on legal issues as they arise.

\_\_\_ 6-Outstanding \_\_\_ 5-Excellent \_\_\_ 4-Very Good \_\_\_ 3-Good \_\_\_ 2-Fair  
\_\_\_ 1-Poor \_\_\_ 0-Unsatisfactory

Comments:

5. **Relationship with the Community:** Understands general community issues and concerns. Remains involved and active in the community, represents the City well and in a professional and positive manner. Works effectively with the media and press, community organizations and other agencies.

\_\_\_ 6-Outstanding \_\_\_ 5-Excellent \_\_\_ 4-Very Good \_\_\_ 3-Good \_\_\_ 2-Fair  
\_\_\_ 1-Poor \_\_\_ 0-Unsatisfactory

Comments:

6. **Relationship with City Manager and Department Heads:** Demonstrates a positive legal consultative relationship with the City Manager and Department Heads in their pursuit of meeting the goals and objectives of the City.

\_\_\_ 6-Outstanding \_\_\_ 5-Excellent \_\_\_ 4-Very Good \_\_\_ 3-Good \_\_\_ 2-Fair  
1-Poor \_\_\_ 0-Unsatisfactory

Comments:

7. **Completion of Work:** Completes work assignments within reasonable or set time frames. (In this context, "reasonable" means a time frame which is acceptable to Council in terms of their priorities, and in consideration of the attorney's ongoing workload.)

\_\_\_ 6-Outstanding \_\_\_ 5-Excellent \_\_\_ 4-Very Good \_\_\_ 3-Good \_\_\_ 2-Fair

\_\_\_ 1-Poor \_\_\_ 0-Unsatisfactory

**Comments:**

**Achievements:** Identify a few of the top achievements or strong points you observed in the City Attorney over the past year.

**Comments:**

**Objectives:** List two-to-three performance objectives that you feel are important for the City Attorney to work on for the coming year.

**Comments:**



Achievements:

- City Attorney has been successful in implementing ordinances and resolutions as directed by council and CM.
- City Attorney follows up effectively with requests made by council.
- City Attorney answers questions in a timely manner as it relates legal advice.
- City Attorney works to prevent legal issues from occurring.

Objectives:

- Work to minimize legal cost by limiting task to those regarding legal issues and utilizing City- in house staff as much as possible.
- Work to be impartial and objective in recognizing legal issues.
- CA work to possess and provide an efficient and effective knowledge of the City's Municipal Code and regulations.
- Work to avoid delays for City of Westlake development projects.
- Work to build and maintain effectively working relationships among and management.

# City of Westlake Attorney Performance Review



## **Purpose of Review**

The purpose of the annual review process of Charter Officer (City Attorney) conducted by the City Council is to:

1. Strengthen the working relationship between the Council and the City Attorney.
2. Provide a mechanism for regular reviews.
3. Identify performance objectives for the City Attorney.
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## **Frequency**

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6. The performance review process is not intended to and shall not be constructed as a re-opening or modification of the City Attorney's existing contract.

# City of Westlake Attorney Performance Review



Date: 10/27/2020

Review Period from: \_\_\_\_\_ To: \_\_\_\_\_

Submitted by: Mayor Roger Manning

The following pages define significant areas of responsibility for the City Attorney. In each section, examples of performance and responsibilities are articulated to better explain each subject heading. Please rate the Attorney's performance based on the following categories:

0	<b>Unsatisfactory:</b> Fails to meet all expectations	Performance is well below expectations in all areas of responsibility. Serious performance deficiencies that prohibit adequate performance in the position. Should be evaluated for termination of contract.
1	<b>Poor:</b> Fails to meet most expectations	Performance is well below expectations in most areas of responsibility. Serious performance deficiencies that inhibit adequate performance in the position. Should be evaluated for termination of contract.
2	<b>Fair:</b> Meets most expectations	Often fails to meet performance expectations of the position. Performance is generally adequate but is deficient in one or more key areas and will require improvement.
3	<b>Good:</b> Meets expectations	Meets all expectations of the position and is competent in the performance of responsibilities.
4	<b>Very Good:</b> Meets all expectations	Occasionally exceeds performance expectations of the position. Performs the most difficult parts of the job competently and thoroughly. Contributes significant results on their own initiative. Works with a high level of independence, initiative and concern for the quality of the service produced by the organization.
5	<b>Excellent:</b> Exceeds all expectations	Overall skills and abilities greatly exceed the expectations of the position. Demonstrates strong expertise within key areas of responsibilities. Occasionally receives outstanding results beyond scope of the performance plan in some key areas of responsibility over entire performance period.
6	<b>Outstanding:</b> Far Exceeds all expectations	Overall skills and abilities far exceed all expectations of the position. Demonstrates strong expertise within key areas of responsibilities. Delivers consistently outstanding results beyond scope of the performance plan over entire period. Anticipates needs and executes plans flawlessly.

1. **Communication:** Effectively communicates (orally and in writing) complex issues to government officials, the press and the public where diverse viewpoints and goals exist. Ensures that Council members receive important information in a timely and effective manner. Presents the Council and community with clear and accurate written reports and correspondence. Responds to correspondence, requests and complaints quickly and appropriately. Facilitates open two-way communication and encourages mutual honesty and respect with the community, Council, City Manager, and staff.

4.5  
\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent \_\_\_\_\_ 4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

2. **Job Knowledge:** Possesses and applies a comprehensive understanding and knowledge of the City Charter, Code of Ordinances, Code of Ethics and Florida Statutes. Applies effective litigation skills before trial and appellate level courts and administrative agencies. Has an extensive understanding of legal issues faced by local governments. Has the ability to effectively formulate and advance legal strategies that further the goals of the City.

4.5  
\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent \_\_\_\_\_ 4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

3. **Professionalism:** Deals effectively and appropriately with the public and other organizations. Devotes time and energy to the job. Demonstrates high ethical standards in the organization. Works to keep politics and personal perspectives out of the decision-making process. Stays active in professional organizations.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent  4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

4. **Management:** Effective in the management, supervisory and interpersonal skills in the context of both a law office and organization, including the ability to establish and maintain effective working relationships with City Manager, City Council, Contract Departments, other government officials, boards and committees, and the general public. Creates a collaborative, team building, environment. Recognizes the accomplishments of contract staff and other agencies working on behalf of the City. Supports professional growth and opportunity within the organization. Accepts full accountability for staff and the outcome of City projects or decisions. Identifies organizational problems and takes remedial action.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent \_\_\_\_\_ 4-Very Good  3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

4. **Relationship with Council:** Demonstrates a positive and trusting relationship with Council, both as a group and individually, by acting as an advisor to them on legal issues as they arise.

\_\_\_\_\_ 6-Outstanding  5-Excellent \_\_\_\_\_ 4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

5. **Relationship with the Community:** Understands general community issues and concerns. Remains involved and active in the community, represents the City well and in a professional and positive manner. Works effectively with the media and press, community organizations and other agencies.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent \_\_\_\_\_ 4-Very Good  3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

6. **Relationship with City Manager and Department Heads:** Demonstrates a positive legal consultative relationship with the City Manager and Department Heads in their pursuit of meeting the goals and objectives of the City.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent \_\_\_\_\_ 4-Very Good  3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

7. **Completion of Work:** Completes work assignments within reasonable or set time frames. (In this context, "reasonable" means a time frame which is acceptable to Council in terms of their priorities, and in consideration of the attorney's ongoing workload.)

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent  4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

**Achievements:** Identify a few of the top achievements or strong points you observed in the City Attorney over the past year.

Comments:

*Communicates well with the city council.*

**Objectives:** List two-to-three performance objectives that you feel are important for the City Attorney to work on for the coming year.

Comments:

*Work more closely with the City Manager.*

**File Attachments for Item:**

C. Charter Position Review – City Manager, Kenneth Cassel

**Submitted By:** Zoie Burgess, City Clerk





# Meeting Agenda Item Coversheet

<b>MEETING DATE:</b>		11/02/2020	<b>Submitted By:</b> Zoie Burgess, City Clerk	
<b>SUBJECT:</b> <i>This will be the name of the Item as it will appear on the Agenda</i>		Charter Position Review – City Manager, Kenneth Cassel		
<b>STAFF RECOMMENDATION:</b> (MOTION READY)				
<b>SUMMARY and/or JUSTIFICATION:</b>		<p>Upon Council’s direction, it was requested that a process be implemented to evaluate the Charter officers – City Attorney and City Manager. An evaluation tool was provided to each Council member on October 9<sup>th</sup> for both positions and an open invitation to conduct one-on-one reviews with each charter officer, which would be publicly discussed at a Special Council Meeting.</p> <p>At the Special Council Meeting, Council will have the opportunity to discuss the submitted evaluations, providing a review of past performance and any guidance for improvement, directives, and initiatives for future City activity.</p>		
<b>SELECT, if applicable</b>	<b>AGREEMENT:</b>		<b>BUDGET:</b>	
	<b>STAFF REPORT:</b>		<b>PROCLAMATION:</b>	
	<b>EXHIBIT(S):</b>		<b>OTHER:</b>	
<b>IDENTIFY EACH ATTACHMENT.</b> <i>For example, an agreement may have 2 exhibits, identify the agreement and Exhibit A and Exhibit B</i>				
<b>SELECT, if applicable</b>	<b>RESOLUTION:</b>		<b>ORDINANCE:</b>	
<b>IDENTIFY FULL RESOLUTION OR ORDINANCE TITLE</b> <i>(if Item is <u>not</u> a Resolution or Ordinance, please erase all default text from this field’s textbox and leave blank) <b><u>Please keep text indented.</u></b></i>				
<b>FISCAL IMPACT (if any):</b>				\$

# City of Westlake Manager Performance Review



**Date:** October 26, 2020

**Review Period from:** June 16, 2016 **To:** October 25, 2020

**Submitted by:** Councilwoman Kara Crump

The following pages define significant areas of responsibility for the City Manager. In each section, examples of performance and responsibilities are articulated to better explain each subject heading. Please rate the Manager's performance based on the following categories:

0	<b>Unsatisfactory:</b> Fails to meet all expectations	Performance is well below expectations in all areas of responsibility. Serious performance deficiencies that prohibit adequate performance in the position. Should be evaluated for termination of contract.
1	<b>Poor:</b> Fails to meet most expectations	Performance is well below expectations in most areas of responsibility. Serious performance deficiencies that inhibit adequate performance in the position. Should be evaluated for termination of contract.
2	<b>Fair:</b> Meets most expectations	Often fails to meet performance expectations of the position. Performance is generally adequate but is deficient in one or more key areas and will require improvement.
3	<b>Good:</b> Meets expectations	Meets all expectations of the position and is competent in the performance of responsibilities.
4	<b>Very Good:</b> Meets all expectations	Occasionally exceeds performance expectations of the position. Performs the most difficult parts of the job competently and thoroughly. Contributes significant results on their own initiative. Works with a high level of independence, initiative and concern for the quality of the service produced by the organization.
5	<b>Excellent:</b> Exceeds all expectations	Overall skills and abilities greatly exceed the expectations of the position. Demonstrates strong expertise within key areas of responsibilities. Occasionally receives outstanding results beyond scope of the performance plan in some key areas of responsibility over entire performance period.
6	<b>Outstanding:</b> Far Exceeds all expectations	Overall skills and abilities far exceed all expectations of the position. Demonstrates strong expertise within key areas of responsibilities. Delivers consistently outstanding results beyond scope of the performance plan over entire period. Anticipates needs and executes plans flawlessly.

1. **Management of the Organization:** Effectively runs the operations of the organization. Creates a collaborative, team building, environment for contract staff. Recognizes the accomplishments of contract staff and other agencies working on behalf of the City. Supports professional growth and opportunity within the organization. Accepts full accountability for staff and the outcome of City projects or decisions. Identifies organizational problems and takes remedial action.

6-Outstanding  5-Excellent  4-Very Good  3-Good  2-Fair  
 1-Poor  0-Unsatisfactory

**Comments:**

**I would like to see the City Manager have more day-to-day control of the city administration to help control the conflict between the City Manager and City Attorney.**

2. **Execution of Policy:** Understands and complies with policies and procedures governing the City. Implements City policy fairly and consistently based upon Council decisions, goals, and applicable laws and regulations. Works towards accomplishing identified Council goals. Presents matters in a factual, analytical way. Coordinates Council policy decisions to staff, departments, other organizations, and the community.

6-Outstanding  5-Excellent  4-Very Good  3-Good  2-Fair  
 1-Poor  0-Unsatisfactory

**Comments:**

**The City Manager has done a good job of staying in front of policy issues and kept the Council informed. The City Manager keeps a very calm and cool professional approach.**

3. **Financial Management:** Properly prepares and manages the budget. Demonstrates ingenuity in approaching budgetary matters including long range revenues and expenditures for the organization.

\_\_\_\_ 6-Outstanding \_\_\_\_ 5-Excellent \_\_\_\_ 4-Very Good  3-Good \_\_\_\_ 2-Fair  
\_\_\_\_ 1-Poor \_\_\_\_ 0-Unsatisfactory

**Comments:**

**I think over time the City Manager has made improvements to the organization and structure of the budget. Future focus needs to be on expense and cost control in budgets.**

4. **Relationship with Council:** Provides regular updates to the Council keeping them informed about current and critical issues. Makes effort to be accessible to Council Members. Handles issues brought by the Council in a consistent and timely manner. Maintains an honest approach to new ideas, issues, and complaints raised by Council Members.

\_\_\_\_ 6-Outstanding \_\_\_\_ 5-Excellent  4-Very Good \_\_\_\_ 3-Good \_\_\_\_ 2-Fair  
\_\_\_\_ 1-Poor \_\_\_\_ 0-Unsatisfactory

**Comments:**

**The City Manager does a really good job sending updates and keeping the council informed. Through this effort he has built a strong relationship with me. Anytime I need the City Manager he has taken my call or returned my call promptly.**



5. **Community Relationships:** Makes an effort to understand general community issues and concerns. Remains involved and active in the community, represents the City well and in a professional .and positive manner. Works proactively with the media and press. Works effectively with community organizations and other agencies. Educates the community on the City goals and services

\_\_\_\_ 6-Outstanding \_\_\_\_ 5-Excellent  4-Very Good \_\_\_\_ 3-Good \_\_\_\_ 2-Fair  
\_\_\_\_ 1-Poor \_\_\_\_ 0-Unsatisfactory

**Comments:**

**Efforts by the City Manager to create "Coffee with the Manager" was a good addition and greatly improved relationship with the residents. The City Manager has also worked hard to resolve difference with Palm Beach County on where to locate new facilities.**

6. **Communication:** Insures that Council Members receive important information in a timely and effective manner. Presents the Council and community with clear and accurate written reports and correspondence. Responds to correspondence, requests, and complaints quickly and appropriately. Facilitates open two-way communication and encourages mutual honesty and respect with the community, Council, and contract staff.

\_\_\_\_ 6-Outstanding \_\_\_\_ 5-Excellent  4-Very Good \_\_\_\_ 3-Good \_\_\_\_ 2-Fair  
\_\_\_\_ 1-Poor \_\_\_\_ 0-Unsatisfactory

**Comments:**

**The weekly updates to Council really improved communication. Going forward I would like to see a presence on Social Media. Would like to see this as a priority.**

7. **Leadership:** Provides the Council and the organization with real solutions and creative alternatives to issues and problems. Anticipates and responds to issues. Assures that Council decisions are thought out, objective, and consistent with past practices, and are legal and ethical. Makes use of sound administrative practices. Leads the organization through effective management of people and tasks.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent \_\_\_\_\_ 4-Very Good \_\_\_\_\_ 3-Good  2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

**The City Manager is good about thinking out of the box and not being constrained or rigid in approach to tackle problems. However, given the toxic environment with the City Attorney I would like to see the City Manager to step out and advise Council on how best to navigate the issues that are now hurting the city from moving forward.**

8. **Professionalism:** Deals effectively and appropriately with the public and other organizations. Devotes time and energy to the job. Demonstrates high ethical standards in the organization. Works to keep "politics", and personal perspectives out of the decision-making process. Stays active in professional organizations and regional issues.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent  4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

**The City Manager presents a very professional approach to his role. I have never seen the City Manager loose his composure.**

**Achievements:** Identify a few of the top achievements or strong points you observed in the City Manager over the past year.

Comments:

**The City Manager has a calm leadership style which projects a good image to the community.**

**The City Manager started "Coffee with the Manager" to reach out to residents.**

**The City Manager made a great hire in the addition of Zoie as City Clerk.**

**Objectives:** List two-to-three performance objectives that you feel are important for the City Manager to work on for the coming year.

Comments:

**The City Manager needs to identify how the toxic environment between him and the City Attorney was established and provide leadership to Council on how best to navigate this issue.**

**The City Manager needs to have complete ownership of the budget.**

# City of Westlake Manager Performance Review



## **Purpose of Review**

The purpose of the annual review process of Charter Officer (City Manager) conducted by the City Council to:

1. Strengthen the working relationship between the Council and the City Manager.
2. Provide a mechanism for regular reviews.
3. Identify performance objectives for the City Manager.
4. Provide feedback to the City Manager and identify areas where improvements may be needed.

## **Frequency**

The City Council will review the City Manager annually. The review process will take place during the budget process and will be completed before the adoption of the annual budget.

## **Review Procedure**

The Review procedure remains at the will and the direction of the City Council and may be modified at any time. In general, the review process will include the following steps:

1. The City Council shall set the review schedule annually.
2. The Mayor and Council Members shall complete the review form and submit to the City Clerk prior to the review meeting.
3. Each Council member shall meet face to face with the City Manager prior to the special meeting review session.
4. The results of the individual reviews will be placed on the agenda of the special City Council meeting.
5. The performance review, and any subsequent actions, will be placed in the official City Records.
6. The performance review process is not intended to and shall not be constructed as a re-opening or modification of the City Manager's existing contract.



# City of Westlake Manager Performance Review



**Date:** 10/26/2020

**Review Period from:** 4/2020 **To:** 10/2020

**Submitted by:** Councilman Patric Paul

The following pages define significant areas of responsibility for the City Manager. In each section, examples of performance and responsibilities are articulated to better explain each subject heading. Please rate the Manager's performance based on the following categories:

0	<b>Unsatisfactory:</b> Fails to meet all expectations	Performance is well below expectations in all areas of responsibility. Serious performance deficiencies that prohibit adequate performance in the position. Should be evaluated for termination of contract.
1	<b>Poor:</b> Fails to meet most expectations	Performance is well below expectations in most areas of responsibility. Serious performance deficiencies that inhibit adequate performance in the position. Should be evaluated for termination of contract.
2	<b>Fair:</b> Meets most expectations	Often fails to meet performance expectations of the position. Performance is generally adequate but is deficient in one or more key areas and will require improvement.
3	<b>Good:</b> Meets expectations	Meets all expectations of the position and is competent in the performance of responsibilities.
4	<b>Very Good:</b> Meets all expectations	Occasionally exceeds performance expectations of the position. Performs the most difficult parts of the job competently and thoroughly. Contributes significant results on their own initiative. Works with a high level of independence, initiative and concern for the quality of the service produced by the organization.
5	<b>Excellent:</b> Exceeds all expectations	Overall skills and abilities greatly exceed the expectations of the position. Demonstrates strong expertise within key areas of responsibilities. Occasionally receives outstanding results beyond scope of the performance plan in some key areas of responsibility over entire performance period.
6	<b>Outstanding:</b> Far Exceeds all expectations	Overall skills and abilities far exceed all expectations of the position. Demonstrates strong expertise within key areas of responsibilities. Delivers consistently outstanding results beyond scope of the performance plan over entire period. Anticipates needs and executes plans flawlessly.

**1. Management of the Organization:** Effectively runs the operations of the organization. Creates a collaborative, team building, environment for contract staff. Recognizes the accomplishments of contract staff and other agencies working on behalf of the City. Supports professional growth and opportunity within the organization. Accepts full accountability for staff and the outcome of City projects or decisions. Identifies organizational problems and takes remedial action.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent \_\_\_\_\_ 4-Very Good  x  3-Good \_\_\_\_\_ 2-Fair

\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:** Mr. Cassel has the knowledge to conduct the business of the City of Westlake. Unfortunately, he failed to meet an important deadline for the City Council Election. As a consequence of this mistake, it caused a delay in the election and seating of the the first two elected council members.

**2. Execution of Policy:** Understands and complies with policies and procedures governing the City. Implements City policy fairly and consistently based upon Council decisions, goals, and applicable laws and regulations. Works towards accomplishing identified Council goals. Presents matters in a factual, analytical way. Coordinates Council policy decisions to staff, departments, other organizations, and the community.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent \_\_\_\_\_ 4-Very Good  X  3-Good \_\_\_\_\_ 2-Fair

\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:** Mr. Cassel provides information based on what he thinks a council member should need to know. Oftentimes, it is necessary to ask Mr. Cassel to provide more detail. Information is not forthcoming when it relates to Seminole Improvement District. Mr. Cassel is working for both the City of Westlake and Seminole Improvement District appears to be problematic and often gives the appearance of a conflict of interest.

**3. Financial Management:** Properly prepares and manages the budget. Demonstrates ingenuity in approaching budgetary matters including long range revenues and expenditures for the organization.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent  X  4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:** The budget was prepared timely but some detailed information was not presented and had to be requested,

**4. Relationship with Council:** Provides regular updates to the Council keeping them informed about current and critical issues. Makes effort to be accessible to Council Members. Handles issues brought by the Council in a consistent and timely manner. Maintains an honest approach to new ideas, issues, and complaints raised by Council Members.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent \_\_\_\_\_ 4-Very Good  X  3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:** Mr Cassel provides information in a timely manner. Some information regarding the City was withheld in favor of Seminole Improvement District and caused a a great deal of friction within the City.

5. **Community Relationships:** Makes an effort to understand general community issues and concerns. Remains involved and active in the community, represents the City well and in a professional .and positive manner. Works proactively with the media and press. Works effectively with community organizations and other agencies. Educates the community on the City goals and services

\_\_\_\_\_ 6-Outstanding  X  5-Excellent \_\_\_\_\_ 4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:** Mr. Cassel has worked effectively on all recommendations and requests from residents such as generators or driveway extensions.

6. **Communication:** Insures that Council Members receive important information in a timely and effective manner. Presents the Council and community with clear and accurate written reports and correspondence. Responds to correspondence, requests, and complaints quickly and appropriately. Facilitates open two-way communication and encourages mutual honesty and respect with the community, Council, and contract staff.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent  X  4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:** Mr. Cassel provides information as it is requested.

**7. Leadership:** Provides the Council and the organization with real solutions and creative alternatives to issues and problems. Anticipates and responds to issues. Assures that Council decisions are thought out, objective, and consistent with past practices, and are legal and ethical. Makes use of sound administrative practices. Leads the organization through effective management of people and tasks.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent \_\_\_\_\_ 4-Very Good  X  3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:** Mr. Cassel's conflict of interest representing both the City of Westlake and the Seminole Improvement District creates conflicts and barriers.

**8. Professionalism:** Deals effectively and appropriately with the public and other organizations. Devotes time and energy to the job. Demonstrates high ethical standards in the organization. Works to keep "politics", and personal perspectives out of the decision-making process. Stays active in professional organizations and regional issues.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent  X  4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:** Mr. Cassel maintains his composure in difficult situations and conducts himself in a professional manner.

**Achievements:** Identify a few of the top achievements or strong points you observed in the City Manager over the past year.

Comments: Mr. Cassel makes himself available to council members and is very knowledgeable about his job responsibilities.

**Objectives:** List two-to-three performance objectives that you feel are important for the City Manager to work on for the coming year.

Comments:

1. Budget needs to be prepared in greater detail and presented to City Council.
2. There is still a concern with the appearance of a conflict of interest in representing Seminole Improvement District and the City of Westlake.

# City of Westlake Manager Performance Review



## **Purpose of Review**

The purpose of the annual review process of Charter Officer (City Manager) conducted by the City Council to:

1. Strengthen the working relationship between the Council and the City Manager.
2. Provide a mechanism for regular reviews.
3. Identify performance objectives for the City Manager.
4. Provide feedback to the City Manager and identify areas where improvements may be needed.

## **Frequency**

The City Council will review the City Manager annually. The review process will take place during the budget process and will be completed before the adoption of the annual budget.

## **Review Procedure**

The Review procedure remains at the will and the direction of the City Council and may be modified at any time. In general, the review process will include the following steps:

1. The City Council shall set the review schedule annually.
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3. Each Council member shall meet face to face with the City Manager prior to the special meeting review session.
4. The results of the individual reviews will be placed on the agenda of the special City Council meeting.
5. The performance review, and any subsequent actions, will be placed in the official City Records.
6. The performance review process is not intended to and shall not be constructed as a re-opening or modification of the City Manager's existing contract.

# City of Westlake Manager Performance Review



**Date:** 10/26/20

**Review Period from:** April 2020 **To:** 10-26-2020

**Submitted by:** Councilman JohnPaul O'Connor seat 3

The following pages define significant areas of responsibility for the City Manager. In each section, examples of performance and responsibilities are articulated to better explain each subject heading. Please rate the Manager's performance based on the following categories:

0	<b>Unsatisfactory:</b> Fails to meet all expectations	Performance is well below expectations in all areas of responsibility. Serious performance deficiencies that prohibit adequate performance in the position. Should be evaluated for termination of contract.
1	<b>Poor:</b> Fails to meet most expectations	Performance is well below expectations in most areas of responsibility. Serious performance deficiencies that inhibit adequate performance in the position. Should be evaluated for termination of contract.
2	<b>Fair:</b> Meets most expectations	Often fails to meet performance expectations of the position. Performance is generally adequate but is deficient in one or more key areas and will require improvement.
3	<b>Good:</b> Meets expectations	Meets all expectations of the position and is competent in the performance of responsibilities.
4	<b>Very Good:</b> Meets all expectations	Occasionally exceeds performance expectations of the position. Performs the most difficult parts of the job competently and thoroughly. Contributes significant results on their own initiative. Works with a high level of independence, initiative and concern for the quality of the service produced by the organization.
5	<b>Excellent:</b> Exceeds all expectations	Overall skills and abilities greatly exceed the expectations of the position. Demonstrates strong expertise within key areas of responsibilities. Occasionally receives outstanding results beyond scope of the performance plan in some key areas of responsibility over entire performance period.
6	<b>Outstanding:</b> Far Exceeds all expectations	Overall skills and abilities far exceed all expectations of the position. Demonstrates strong expertise within key areas of responsibilities. Delivers consistently outstanding results beyond scope of the performance plan over entire period. Anticipates needs and executes plans flawlessly.



**1. Management of the Organization:** Effectively runs the operations of the organization. Creates a collaborative, team building, environment for contract staff. Recognizes the accomplishments of contract staff and other agencies working on behalf of the City. Supports professional growth and opportunity within the organization. Accepts full accountability for staff and the outcome of City projects or decisions. Identifies organizational problems and takes remedial action.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent   x   4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

Ultimately the City manager understands that the buck stops with him and has not been quick to try and place blame on other departments. Their failures are his failures. However I've observed many things "fall through the cracks" on an admin level. plenty of room for Improvement here

**2. Execution of Policy:** Understands and complies with policies and procedures governing the City. Implements City policy fairly and consistently based upon Council decisions, goals, and applicable laws and regulations. Works towards accomplishing identified Council goals. Presents matters in a factual, analytical way. Coordinates Council policy decisions to staff, departments, other organizations, and the community.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent   x   4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

City manager appears to exercise broad personal discretion when governing the city. However I believe he respects the mayors and councils directives when given and would not act in the contrary. If a policy decision or directive might prove to be "Controversial" I would hope the city manager seek direction from the council first unless it is time sensitive then his best judgment should be applied.

**3. Financial Management:** Properly prepares and manages the budget. Demonstrates ingenuity in approaching budgetary matters including long range revenues and expenditures for the organization.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent  4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

Again Ive seen some maters fall through the cracks but when held accountable The city manager has accepted responsibility and proved to be very effective in curing these errors. as always there is room for improvement.

**4. Relationship with Council:** Provides regular updates to the Council keeping them informed about current and critical issues. Makes effort to be accessible to Council Members. Handles issues brought by the Council in a consistent and timely manner. Maintains an honest approach to new ideas, issues, and complaints raised by Council Members.

\_\_\_\_\_ 6-Outstanding  5-Excellent \_\_\_\_\_ 4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

I can only speak to my personal tenure as a councilman (7 Months or so) but Mr. Cassel always makes himself accessible to me, goes out of his way to put things on my radar that could possibly become an issue, and is receptive to my concerns.

5. **Community Relationships:** Makes an effort to understand general community issues and concerns. Remains involved and active in the community, represents the City well and in a professional .and positive manner. Works proactively with the media and press. Works effectively with community organizations and other agencies. Educates the community on the City goals and services

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent  4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

On several occasions Mr. Cassel has advised me to have a resident with an issue contact him directly. he also offers a monthly "Coffee with the manager" where he engages directly with the residents. The community outreach-intent is there, however I do have to mention that I have had reports of some of the information given at the Coffee sessions to be incomplete or incorrect. I plan on attending some of these in the future.

6. **Communication:** Insures that Council Members receive important information in a timely and effective manner. Presents the Council and community with clear and accurate written reports and correspondence. Responds to correspondence, requests, and complaints quickly and appropriately. Facilitates open two-way communication and encourages mutual honesty and respect with the community, Council, and contract staff.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent  4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

Mr. Cassel's communication with me personally has been nothing short of exemplary. I feel there is much room for improvement in terms of his communicating with the residents and disseminating the information promptly on the website. I have seen a recent improvement in this regard but we can do even better. Id like to see newsletters, email blasts, social media pushes etc... One of the greatest concerns I hear is residents just want to know whats going on.

- 7. Leadership:** Provides the Council and the organization with real solutions and creative alternatives to issues and problems. Anticipates and responds to issues. Assures that Council decisions are thought out, objective, and consistent with past practices, and are legal and ethical. Makes use of sound administrative practices. Leads the organization through effective management of people and tasks.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent   x   4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

I know that a lot of this happens behind the scenes and then I get briefed post facto. It appears that most of The city Managers practices have been of sound judgment. On at-least two issue where I felt otherwise I immediately called the city manager voiced my concerns and ultimately my concerns were cured.

- 8. Professionalism:** Deals effectively and appropriately with the public and other organizations. Devotes time and energy to the job. Demonstrates high ethical standards in the organization. Works to keep "politics", and personal perspectives out of the decision-making process. Stays active in professional organizations and regional issues.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent   x   4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

In my tenure thus far I have no qualms with the professionalism of the City Manager. I would like to see his relationship with the City attorney improved drastically, and I would strongly advise him to take whatever steps necessary to do so.

**Achievements:** Identify a few of the top achievements or strong points you observed in the City Manager over the past year.

Comments:

The handling of the Covid-19 crisis by the City Manager has been impressive, departments were shifted to work from home, meetings were shifted to virtual, Communication regarding the virus to Council has been top notch.

**Objectives:** List two-to-three performance objectives that you feel are important for the City Manager to work on for the coming year.

Comments:

Id like to see an extraordinary effort from the city manager to bring an alternative Internet and cable service provider such as Xfinity or other to the residences of Westlake. Right now the only service provider is ATT.

Id like to see the city manager commence a dialogue with the US Postmaster and cure our issues regarding poor mail service. Packages are constantly being mis-delivered or arriving soaking wet due to our carrier using a personal pickup truck over a traditional mail Jeep.

Id like to see The City manager achieve a drastic improvement in the quality of the Waste Disposal services offered here in Westlake.

# City of Westlake Manager Performance Review



## Purpose of Review

The purpose of the annual review process of Charter Officer (City Manager) conducted by the City Council to:

1. Strengthen the working relationship between the Council and the City Manager.
2. Provide a mechanism for regular reviews.
3. Identify performance objectives for the City Manager.
4. Provide feedback to the City Manager and identify areas where improvements may be needed.

## Frequency

The City Council will review the City Manager annually. The review process will take place during the budget process and will be completed before the adoption of the annual budget.

## Review Procedure

The Review procedure remains at the will and the direction of the City Council and may be modified at any time. In general, the review process will include the following steps:

1. The City Council shall set the review schedule annually.
2. The Mayor and Council Members shall complete the review form and submit to the City Clerk prior to the review meeting.
3. Each Council member shall meet face to face with the City Manager prior to the special meeting review session.
4. The results of the individual reviews will be placed on the agenda of the special City Council meeting.
5. The performance review, and any subsequent actions, will be placed in the official City Records.
6. The performance review process is not intended to and shall not be constructed as a re-opening or modification of the City Manager's existing contract.



# City of Westlake Manager Performance Review



Date: 10/26/2020

Review Period from: 2016 To: 2020

Submitted by: Katrina Long-Robinson, Seat 4

The following pages define significant areas of responsibility for the City Manager. In each section, examples of performance and responsibilities are articulated to better explain each subject heading. Please rate the Manager's performance based on the following categories:

0	<b>Unsatisfactory:</b> Fails to meet all expectations	Performance is well below expectations in all areas of responsibility. Serious performance deficiencies that prohibit adequate performance in the position. Should be evaluated for termination of contract.
1	<b>Poor:</b> Fails to meet most expectations	Performance is well below expectations in most areas of responsibility. Serious performance deficiencies that inhibit adequate performance in the position. Should be evaluated for termination of contract.
2	<b>Fair:</b> Meets most expectations	Often fails to meet performance expectations of the position. Performance is generally adequate but is deficient in one or more key areas and will require improvement.
3	<b>Good:</b> Meets expectations	Meets all expectations of the position and is competent in the performance of responsibilities.
4	<b>Very Good:</b> Meets all expectations	Occasionally exceeds performance expectations of the position. Performs the most difficult parts of the job competently and thoroughly. Contributes significant results on their own initiative. Works with a high level of independence, initiative and concern for the quality of the service produced by the organization.
5	<b>Excellent:</b> Exceeds all expectations	Overall skills and abilities greatly exceed the expectations of the position. Demonstrates strong expertise within key areas of responsibilities. Occasionally receives outstanding results beyond scope of the performance plan in some key areas of responsibility over entire performance period.
6	<b>Outstanding:</b> Far Exceeds all expectations	Overall skills and abilities far exceed all expectations of the position. Demonstrates strong expertise within key areas of responsibilities. Delivers consistently outstanding results beyond scope of the performance plan over entire period. Anticipates needs and executes plans flawlessly.



3. **Financial Management:** Property prepares and manages the budget. Demonstrates financial responsibility in the use of City funds.
1. **Management of the Organization:** Effectively runs the operations of the organization. Creates a collaborative, team building, environment for contract staff. Recognizes the accomplishments of contract staff and other agencies working on behalf of the City. Supports professional growth and opportunity within the organization. Accepts full accountability for staff and the outcome of City projects or decisions. Identifies organizational problems and takes remedial action.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent \_\_\_\_\_ 4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair \_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

Comments:

4. **Relationships:** Works effectively with Council Members, staff, and the community. Represents the City in a professional and courteous manner. Coordinates Council policy decisions to staff, departments, other organizations, and the community.
2. **Execution of Policy:** Understands and complies with policies and procedures governing the City. Implements City policy fairly and consistently based upon Council decisions, goals, and applicable laws and regulations. Works towards accomplishing identified Council goals. Presents matters in a factual, analytical way. Coordinates Council policy decisions to staff, departments, other organizations, and the community.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent \_\_\_\_\_ 4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair \_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

Comments:

3. **Financial Management:** Properly prepares and manages the budget. Demonstrates ingenuity in approaching budgetary matters including long range revenues and expenditures for the organization.

\_\_\_ 6-Outstanding \_\_\_ 5-Excellent \_\_\_ 4-Very Good \_\_\_ 3-Good \_\_\_ 2-Fair  
\_\_\_ 1-Poor \_\_\_ 0-Unsatisfactory

Comments:

4. **Relationship with Council:** Provides regular updates to the Council keeping them informed about current and critical issues. Makes effort to be accessible to Council Members. Handles issues brought by the Council in a consistent and timely manner. Maintains an honest approach to new ideas, issues, and complaints raised by Council Members.

\_\_\_ 6-Outstanding \_\_\_ 5-Excellent \_\_\_ 4-Very Good \_\_\_ 3-Good \_\_\_ 2-Fair  
1-Poor \_\_\_ 0-Unsatisfactory

Comments:

5. **Community Relationships:** Makes an effort to understand general community issues and concerns. Remains involved and active in the community, represents the City well and in a professional and positive manner. Works proactively with the media and press. Works effectively with community organizations and other agencies. Educates the community on the City goals and services

6-Outstanding 5-Excellent 4-Very Good 3-Good 2-Fair 1-Poor 0-Unsatisfactory

6-Outstanding 5-Excellent 4-Very Good 3-Good 2-Fair 1-Poor 0-Unsatisfactory

6-Outstanding 5-Excellent 4-Very Good 3-Good 2-Fair 1-Poor 0-Unsatisfactory

Comments:

6. **Communication:** Insures that Council Members receive important information in a timely and effective manner. Presents the Council and community with clear and accurate written reports and correspondence. Responds to correspondence, requests, and complaints quickly and appropriately. Facilitates open two-way communication and encourages mutual honesty and respect with the community, Council, and contract staff.

6-Outstanding 5-Excellent 4-Very Good 3-Good 2-Fair 1-Poor 0-Unsatisfactory

6-Outstanding 5-Excellent 4-Very Good 3-Good 2-Fair 1-Poor 0-Unsatisfactory

Comments:



7. **Leadership:** Provides the Council and the organization with real solutions and creative alternatives to issues and problems. Anticipates and responds to issues. Assures that Council decisions are thought out, objective, and consistent with past practices, and are legal and ethical. Makes use of sound administrative practices. Leads the organization through effective management of people and tasks.

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Comments:

8. **Professionalism:** Deals effectively and appropriately with the public and other organizations. Devotes time and energy to the job. Demonstrates high ethical standards in the organization. Works to keep "politics", and personal perspectives out of the decision-making process. Stays active in professional organizations and regional issues.

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Comments:

City Manager Comments:

6. Communication:

Implementing “Coffee with the Manager” was a great way to engage community, council and staff however feedback from some community members leads me to feel they do not receive adequate information from the CM. Relating to council, it is my recommendation for the CM to increase and or implement monthly meetings with council members. Improve written correspondence, engage more in community locally, i.e. communicating with local managers, county legal aides, state/legislative aides and organizations. Doing this will improve community relationships, county-wide relationships and council/staff relationships.

7. Leadership:

While I do believe the CM has progressed there is still much improvement that can be made. Over the course of the 4 years that I have had in working with Mr. Cassell there have been several missed opportunities of leadership style and techniques. For example, budgetary needs as it relates to property taxes paid by constituents. Meeting effective deadlines have also been an issue within the past years, as of late the CM has made improvements but as stated earlier there is room for growth in this area.

Achievements:

Working to make Westlake an innovative, inclusive and safer city for residents, businesses and visitors.

- Comprehensive plan and strategy to address community policing.
- Focused efforts to work willingly with council to communicate COVID-19 response efforts. While you did not hold briefings, CM did send daily updates released from the state and county.
- Improved communication skills over the past 3 months.
- Created opportunities for minority-owned and operated business enterprise.
- Implemented a performance management tool for council to effectively measure staff performance and quality.

Objectives:

- Continue to work to increase General Fund Reserves
- Improving planning and building permit approvals

- Recruiting new existing businesses; creating/implementing jobs/departments
- Increasing community involvement to use new technologies and traditional strategies as it relates to effective communication
- Working to meet deadlines in a timelier manner.
- Ensure staff is trained on equity, diversity and inclusion in on-going effort
- Development/implementation of city hall and facility maintenance plans

# City of Westlake Manager Performance Review



## **Purpose of Review**

The purpose of the annual review process of Charter Officer (City Manager) conducted by the City Council to:

1. Strengthen the working relationship between the Council and the City Manager.
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## **Frequency**

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5. The performance review, and any subsequent actions, will be placed in the official City Records.
6. The performance review process is not intended to and shall not be constructed as a re-opening or modification of the City Manager's existing contract.

# City of Westlake Manager Performance Review



Date: 10/22/20

Review Period from: \_\_\_\_\_ To: \_\_\_\_\_

Submitted by: Mayor Ross Manning

The following pages define significant areas of responsibility for the City Manager. In each section, examples of performance and responsibilities are articulated to better explain each subject heading. Please rate the Manager's performance based on the following categories:

0	<b>Unsatisfactory:</b> Fails to meet all expectations	Performance is well below expectations in all areas of responsibility. Serious performance deficiencies that prohibit adequate performance in the position. Should be evaluated for termination of contract.
1	<b>Poor:</b> Fails to meet most expectations	Performance is well below expectations in most areas of responsibility. Serious performance deficiencies that inhibit adequate performance in the position. Should be evaluated for termination of contract.
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4	<b>Very Good:</b> Meets all expectations	Occasionally exceeds performance expectations of the position. Performs the most difficult parts of the job competently and thoroughly. Contributes significant results on their own initiative. Works with a high level of independence, initiative and concern for the quality of the service produced by the organization.
5	<b>Excellent:</b> Exceeds all expectations	Overall skills and abilities greatly exceed the expectations of the position. Demonstrates strong expertise within key areas of responsibilities. Occasionally receives outstanding results beyond scope of the performance plan in some key areas of responsibility over entire performance period.
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1. **Management of the Organization:** Effectively runs the operations of the organization. Creates a collaborative, team building, environment for contract staff. Recognizes the accomplishments of contract staff and other agencies working on behalf of the City. Supports professional growth and opportunity within the organization. Accepts full accountability for staff and the outcome of City projects or decisions. Identifies organizational problems and takes remedial action.

6-Outstanding  5-Excellent  4-Very Good  3-Good  2-Fair

1-Poor  0-Unsatisfactory

**Comments:**

2. **Execution of Policy:** Understands and complies with policies and procedures governing the City. Implements City policy fairly and consistently based upon Council decisions, goals, and applicable laws and regulations. Works towards accomplishing identified Council goals. Presents matters in a factual, analytical way. Coordinates Council policy decisions to staff, departments, other organizations, and the community.

6-Outstanding  5-Excellent  4-Very Good  3-Good  2-Fair

1-Poor  0-Unsatisfactory

**Comments:**

3. **Financial Management:** Properly prepares and manages the budget. Demonstrates ingenuity in approaching budgetary matters including long range revenues and expenditures for the organization.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent \_\_\_\_\_ 4-Very Good      3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

4. **Relationship with Council:** Provides regular updates to the Council keeping them informed about current and critical issues. Makes effort to be accessible to Council Members. Handles issues brought by the Council in a consistent and timely manner. Maintains an honest approach to new ideas, issues, and complaints raised by Council Members.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent \_\_\_\_\_ 4-Very Good      3-Good \_\_\_\_\_ 2-Fair  
\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

5. **Community Relationships:** Makes an effort to understand general community issues and concerns. Remains involved and active in the community, represents the City well and in a professional and positive manner. Works proactively with the media and press. Works effectively with community organizations and other agencies. Educates the community on the City goals and services

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent \_\_\_\_\_ 4-Very Good  3-Good \_\_\_\_\_ 2-Fair

\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

6. **Communication:** Insures that Council Members receive important information in a timely and effective manner. Presents the Council and community with clear and accurate written reports and correspondence. Responds to correspondence, requests, and complaints quickly and appropriately. Facilitates open two-way communication and encourages mutual honesty and respect with the community, Council, and contract staff.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent  4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair

\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

7. **Leadership:** Provides the Council and the organization with real solutions and creative alternatives to issues and problems. Anticipates and responds to issues. Assures that Council decisions are thought out, objective, and consistent with past practices, and are legal and ethical. Makes use of sound administrative practices. Leads the organization through effective management of people and tasks.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent \_\_\_\_\_ 4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair

\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

8. **Professionalism:** Deals effectively and appropriately with the public and other organizations. Devotes time and energy to the job. Demonstrates high ethical standards in the organization. Works to keep "politics", and personal perspectives out of the decision-making process. Stays active in professional organizations and regional issues.

\_\_\_\_\_ 6-Outstanding \_\_\_\_\_ 5-Excellent \_\_\_\_\_ 4-Very Good \_\_\_\_\_ 3-Good \_\_\_\_\_ 2-Fair

\_\_\_\_\_ 1-Poor \_\_\_\_\_ 0-Unsatisfactory

**Comments:**

**Achievements:** Identify a few of the top achievements or strong points you observed in the City Manager over the past year.

Comments:

Ken has improved his communication with the city council.

**Objectives:** List two-to-three performance objectives that you feel are important for the City Manager to work on for the coming year.

Comments:

work more closely with the city attorney.  
Invite city attorney to staff, SID and developer meetings.