



**ROSEBURG CITY MANAGER EVALUATION WORK GROUP
AGENDA**

Thursday, August 8, 2024

11:00 A.M. Regular Meeting

City Hall – Council Chambers (location updated)

900 SE Douglas Avenue, Roseburg, OR

8/1/24

NOTE: This is an Ad Hoc Work Group. No audience participation is scheduled for this meeting.

Public Online Access:

City website at <https://www.cityofroseburg.org/your-government/mayor-council/council-videos>

Facebook Live at www.Facebook.com/CityofRoseburg

1. Call to Order

2. Roll Call:

Committee Members:

David Mohr

Patrice Sipos

Andrea Zielinski

Staff:

John VanWinkle, Human Resources Director

Amy Nytes, City Recorder

3. Approval of Minutes

A. July 5, 2024 Minutes

4. Discussion Items

A. Current City Manager Evaluation Process

5. Adjournment

***** AMERICANS WITH DISABILITIES ACT NOTICE *****

Please contact the City Recorder's Office, Roseburg City Hall, 900 SE Douglas, Roseburg, OR 97470-3397 (Phone 541-492-6866) at least 48 hours prior to the scheduled meeting time if you need an accommodation. TDD users please call Oregon Telecommunications Relay Service at 1-800-735-2900.

**MINUTES OF THE ROSEBURG CITY MANAGER EVALUATION PROCESS
WORK GROUP
July 5, 2024**

Human Resources Director VanWinkle called the work group of the Roseburg City Manager Evaluation Process to order at 1:00 p.m. on July 5, 2024, at City Hall – 3rd Floor Conference Room, 900 SE Douglas Avenue, Roseburg, Oregon.

2. ROLL CALL

Present: Councilors Shelley Briggs Loosley, David Mohr, Ellen Porter, Patrice Sipos, Ruth Smith, and Andrea Zielinski

Absent: None

Others: Human Resources Director John VanWinkle, City Recorder Amy Nytes, and Management Assistant Grace Jelks

3. Approval of Minutes

A. June 17, 2024 Minutes

B. June 26, 2024 Minutes

There was a consensus to approve the minutes.

4. Discussion Items

A. Human Resources Director VanWinkle presented the City Manager Evaluation Process. Discussion ensued.

Council Members and Staff participated in a Work Group Discussion No. 3, about the current process and offered suggestions for adding clarifying language in certain sections.

The Work Group will meet for Discussion No. 4 on Tuesday, July 23, 2024, beginning at 3:00 p.m. at City Hall – 3rd Floor Conference Room.

5. Adjourn

The work group adjourned at 2:31 p.m.

Grace Jelks

Grace Jelks

Management Staff Assistant

08/08/2024 - DISCUSSION ITEMS A
ATTACHMENT NO. 1

CITY MANAGER PERFORMANCE EVALUATION

CITY OF ROSEBURG, OR



INDIVIDUAL BEING EVALUATED _____

EVALUATION PERIOD _____ to _____

REVIEWER'S NAME _____

DATE SUBMITTED _____

Each member of the City Council must complete this evaluation form, sign it in the appropriate space provided above and return it to _____ no later than _____

All submitted evaluations will be summarized and included on the City Council _____ agenda for discussion.

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Date

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INTRODUCTION

The City of Roseburg and the League of Oregon Cities (LOC) emphasize that a well-executed performance review process for City Managers is essential for promoting good governance, ensuring effective leadership, and advancing the interests of the community served by the city government.

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PURPOSE

The purpose of the Performance Evaluation is to provide feedback on the job performance of the City Manager and, if necessary, create a development plan for areas of improvement. It ~~is~~ may also ~~be~~ used to provide a basis for a merit increase. ~~Additionally, the performance evaluation process provides the Council and City Manager the opportunity and means to establish and maintain open communication and an effective working relationship.~~

- Accountability and Oversight:** The performance review process provides a structured mechanism for evaluating the City Manager's performance against established goals, objectives, and competencies. This accountability ensures that the City Manager's actions and decisions align with the city's strategic priorities and policies set forth by the City Council.
- Feedback and Improvement:** It offers a platform for providing constructive feedback to the City Manager on their performance. This feedback not only acknowledges successes but also identifies areas for improvement and professional growth. By pinpointing strengths and weaknesses, the review process helps the City Manager enhance their effectiveness in managing city affairs.
- Relationship Building:** The review process fosters a stronger working relationship between the City Manager and the City Council. It promotes open communication, transparency, and mutual understanding of expectations, thereby facilitating better collaboration in governance and decision-making.
- Development of Professional Goals:** It assists in setting clear and measurable goals for the City Manager, aligned with the city's strategic plan. These goals help guide the City Manager's efforts in achieving desired outcomes and addressing challenges faced by the community.
- Public Confidence:** By demonstrating accountability and transparency in evaluating the City Manager's performance, the review process helps maintain and enhance public trust in local government. It shows stakeholders that city leadership is committed to effective governance and the responsible use of public resources.

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GUIDELINES AND BEST PRACTICES

The City of Roseburg provides the following guidelines and best practices, based on recommendations and standards from the LOC, International Standards Organization (ISO) and Society for Human Resource Management (SHRM), for evaluating the performance of City Managers, aiming to ensure fairness, effectiveness, and alignment with the city's strategic goals. Here are some key recommendations and standards typically emphasized:

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1. **Clear Performance Criteria:** Define specific performance criteria and expectations for the City Manager based on their role, responsibilities, and the city's strategic plan. This includes core competencies such as leadership, communication, fiscal management, community relations, and operational effectiveness.
2. **Regular Feedback:** Implement a regular feedback mechanism throughout the year, not just during formal evaluations. This can include quarterly reviews or informal check-ins to discuss progress, challenges, and achievements.
3. **Objective Evaluation Process:** Use a structured evaluation process that incorporates both quantitative (e.g., metrics, targets) and qualitative assessments (e.g., narrative feedback, examples of performance). Ensure the evaluation criteria are clear, measurable, and aligned with the city's priorities.
4. **360-Degree Feedback:** Encourage input from various stakeholders, including City Council members, city staff, community leaders, and sometimes residents. This holistic approach provides a comprehensive view of the City Manager's performance and impact.
5. **Goal Setting and Development Planning:** Set SMART goals (Specific, Measurable, Achievable, Relevant, Time-bound) for the City Manager that reflect both short-term priorities and long-term strategic objectives. Develop a professional development plan based on identified strengths and areas for improvement.
6. **Transparency and Documentation:** Maintain transparency throughout the evaluation process by documenting discussions, feedback, and outcomes. Ensure that evaluation results and any associated decisions are communicated effectively to stakeholders.
7. **Performance Review Timeline:** Establish a consistent timeline for conducting evaluations, ensuring they occur at regular intervals that allow for meaningful reflection and adjustment of goals as needed.
8. **Legal and Ethical Compliance:** Ensure that the evaluation process complies with legal requirements, such as employment contracts and local government regulations. Uphold ethical standards in conducting evaluations, respecting confidentiality and fairness.
9. **Continuous Improvement:** Regularly review and refine the evaluation process based on feedback from stakeholders and evolving best practices. Adapt the process to meet changing circumstances and challenges faced by the city.

By adhering to these recommendations and standards, Roseburg enhances the City Manager evaluation process, strengthen governance practices, and ultimately improve the delivery of services to the community.

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ROLES AND RESPONSIBILITIES

City Council:

- Overall Oversight: The City Council holds the primary responsibility for evaluating the City Manager. They define the evaluation process, establish evaluation criteria, and ensure that the evaluation is conducted fairly and transparently.
- Participation in Evaluation: Council members individually evaluate the City Manager's performance based on established criteria. They may also participate in group discussions or interviews related to the evaluation.

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City Council President:

- Receive, Compile, and Distribute Feedback: The Council President is responsible for receiving and compiling all feedback on the City Manager's evaluation, and distributing it the compiled, feedback to the City Council, Mayor, and City Manager, as appropriate.
- Development Plan: If necessary and appropriate, the Council President shall engage and coordinate with the Mayor, if a quorum of received feedback, indicates an expectation(s) is not being met.
- Participation in Evaluation: Council President provides their own evaluation of the City Manager's performance and may lead discussions during council meetings regarding the evaluation outcomes.
- City Council Onboarding: In coordination with the Mayor and HR Director, the Council President will be responsible for ensuring that all newly elected City Council members are made aware of the City Manager Evaluation process.

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Mayor:

- Facilitator: The Mayor facilitates the evaluation process, ensuring that it proceeds according to established procedures and timelines.
- City Council Onboarding: In coordination with the Mayor and HR Director, the Council President will be responsible for ensuring that all newly elected City Council members are made aware of the City Manager Evaluation process.
- Input and Feedback: The Mayor provides their own evaluation of the City Manager's performance and may lead discussions during council meetings regarding the evaluation outcomes.
- Development Plan: if necessary and as appropriate, the Mayor shall facilitate the Development Plan process.
- Annual Review of Process: Annually, the Mayor shall direct the Council President and all interested Council Members to review the City Manager Evaluation process, and bring back any recommendations to the City Council for approval.

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City Manager:

- Quarterly Update: Once a quarter, in an executive session, provide an update to the City Council and Mayor on progress of goals and objectives.
- Annual Update: Annually, provide an update to the City Council and Mayor on progress of goals and objectives.
- Participation in Discussion: The City Manager participates in discussions related to their performance evaluation, providing context, examples, and responses to feedback.

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City Staff and Department Heads:

- Input and Feedback: Relevant city staff and department heads may provide input into the City Manager's evaluation process, especially regarding their interactions and collaboration with the City Manager.

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City of Roseburg Human Resources Director:

- Trusted Advisor: As appropriate, the HR Director may act as a subject matter expert and assist with coordinating the City Manager's performance review process, as long as it doesn't create a conflict of interest as a direct report to the City Manager.

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Responsibilities:

1. Establish Evaluation Criteria: Define clear and objective criteria for evaluating the City Manager's performance. This includes setting goals, specific objectives, competencies, and standards that reflect the city's strategic priorities and expectations.
2. Conduct Evaluations: Ensure that evaluations are conducted at regular intervals as defined by city policies or employment contracts. This may include annual evaluations, periodic reviews, or feedback sessions throughout the year.
3. Collect Feedback: Gather feedback from various stakeholders, including council members, city staff, community leaders, and sometimes residents. This feedback provides a comprehensive view of the City Manager's performance and impact.
4. Review Documentation: Review documentation related to the City Manager's performance, including reports, metrics, and other relevant information. Ensure that documentation is accurate, comprehensive, and supports evaluation findings.
5. Provide Constructive Feedback: Offer constructive feedback to the City Manager based on evaluation outcomes. Highlight strengths and achievements while identifying areas for improvement and professional development.
6. Develop Action Plans: Collaborate with the City Manager to develop action plans for improvement, if necessary. These plans should outline specific goals, timelines, and resources needed to address identified areas of concern.
7. Communicate Evaluation Results: Communicate evaluation results and decisions to the City Manager in a clear and respectful manner. Ensure that any decisions related to compensation,

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contract renewal, or performance improvement are communicated according to established protocols.

8. **Monitor Progress:** Monitor the City Manager's progress towards achieving goals and addressing areas for improvement identified during the evaluation. Provide ongoing support and feedback as needed throughout the evaluation period.

By clearly defining roles and responsibilities and following established procedures, the City of Roseburg can ensure that the City Manager evaluation process is fair, objective, and contributes to effective governance and leadership.

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PROCESS

Performance evaluations are based on performance standards that address the competencies, skills and expected outcomes necessary for being an effective City Manager. These standards define the level at which the City Manager must perform ~~his or her~~their job duties to meet the Council's expectations. Performance evaluations should include positive feedback as well as areas for improvement and examples of observed behavior.

The Council and Mayor should meet periodically to monitor the performance of the organization and the City Manager. The City Of Roseburg has determined that the City Manager job performance review and evaluation process will take place as follows:

1. A **quarterly executive session** at which time the City Council will review the job performance of the City Manager. This is an oral review session intended to provide the opportunity for discussion with input from both the Council and the City Manager. Core competencies as described in Performance Evaluation Form should be used to guide this group discussion. Specific examples should be used during this discussion to ensure clarity and meaningful feedback. These quarterly performance reviews provide for open communication and progress checks, as well as a basis for the formal annual performance evaluation. Quarterly evaluations will not take place during the October – December quarter while the formal annual evaluation is in progress.
2. ~~2.~~ **Annually**, beginning in the fall and concluding by the end of the calendar year, there will be a formal written process where each Councilor will complete this, or a similar form, which will then be used as the formal, official Performance Evaluation. At the time of the formal review, there should be no surprises to either the City Council or the City Manager. The entire City Council and the City Manager have input into the performance evaluation. This gives both parties the opportunity to be heard and to provide honest input and make the performance evaluation a joint process.
3. **Each year, not later than 30 days of the evaluation, City Council will establish specific objectives for the City Manager for the upcoming year. These objectives may include issues that are beyond the Council's stated goals. These objectives will be included on the evaluation form and shall be part of the performance review.**

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Commented [EP1]: Do we want these to be part of the form or as an attachment since these objectives will likely change each year?

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Timelines

First Meeting in July:

In July, the City Manager will preset a report on the accomplishments of Council Goals and Objectives adopted by the City Council.

Late July/Early August:

The Mayor and City Councilors may meet one-on-one with the City Manager as necessary, to discuss aspects of the City Manager's performance during the past year. The City Manager and the Mayor/Councilor may discuss individually any performance concerns during their one-on-one meetings.

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Late July / Early August:

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City Manager performance review feedback forms or surveys are distributed to the Mayor, City Council, and Department Heads.

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Late-August:

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Completed feedback forms are submitted to the Council President and/or Mayor in sufficient time to be consolidated into one report for inclusion in the City Council agenda packet for next appropriate meeting.

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If the Mayor and Council President identify that a quorum of feedback on any one evaluated area is rated at or below a "2", they will determine whether an executive session is necessary to discuss the City Manager's performance, as appropriate and within law and established practices.

August/Early September:

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The City Manager's performance appraisal is conducted. The City Manager has the right to choose whether this shall be done in open session or in executive session.

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Evaluation of Core Competencies

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The City of Roseburg has identified that the City Manager shall be evaluated on the [specific objectives outlined by City Council each year as well as the 10 Core Competencies](#) below:

1. Individual Characteristics and Behaviors

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City Managers are expected to exhibit personal qualities such as diligence, integrity, and a proactive approach to their duties. They should demonstrate sound judgment, maintain composure, and uphold a professional demeanor that aligns with the responsibilities of their executive position. This competency assesses their ability to effectively manage themselves and their conduct in representing the city's interests.

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2. Professional Skills and Qualifications

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This competency evaluates the City Manager's expertise and qualifications in local government management. It includes their knowledge of current practices, laws, and regulations affecting municipal operations. City Managers are expected to demonstrate innovation, analytical skills, and the ability to apply strategic thinking to problem-solving and decision-making within the context of city governance.

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3. Relations with elected members of the City Council and Mayor

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City Managers must effectively collaborate with elected officials to carry out the city's policies and priorities. This competency evaluates their ability to facilitate communication, provide

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timely and accurate information, and support the Council's decision-making process. It emphasizes professionalism, responsiveness, and the capacity to navigate complex political dynamics while maintaining neutrality and respect for democratic governance.

4. Policy Development and Execution

City Managers are responsible for translating Council directives into actionable policies and initiatives that reflect community needs and priorities. This competency assesses their skill in drafting, implementing, and evaluating policies that align with legal requirements and support the city's strategic objectives. It includes the ability to anticipate challenges, propose solutions, and adapt policies as necessary to address evolving circumstances.

5. Reporting

Effective reporting by City Managers involves timely and transparent communication with the City Council and community stakeholders. This competency evaluates their ability to provide accurate and comprehensive reports that inform decision-making, demonstrate accountability, and ensure public access to relevant information. Reports should be clear, concise, and tailored to meet the informational needs of diverse audiences.

6. Citizen Relations

City Managers are expected to engage with residents and community groups in a responsive and respectful manner. This competency assesses their dedication to public service, ability to address citizen inquiries and concerns promptly, and commitment to maintaining open lines of communication. It includes efforts to foster public trust, promote civic participation, and uphold the city's reputation for responsiveness and accountability.

7. Staffing

This competency evaluates the City Manager's role in recruiting, retaining, and managing a competent and motivated workforce. It includes overseeing personnel policies, promoting professional development opportunities, and maintaining a positive organizational culture. City Managers should demonstrate fair and effective management practices that support employee morale, productivity, and commitment to delivering quality public services.

8. Supervision

City Managers must provide effective leadership to department heads and staff, encouraging initiative, collaboration, and innovation while maintaining overall operational oversight. This competency assesses their ability to delegate responsibilities, provide constructive feedback, and empower staff to achieve departmental goals. It emphasizes fostering a supportive and inclusive work environment that values diversity, teamwork, and professional growth.

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9. Fiscal Management

Sound fiscal management by City Managers involves preparing and administering budgets that align with Council priorities and community needs. This competency evaluates their ability to allocate resources responsibly, monitor financial performance, and ensure compliance with fiscal policies and legal requirements. It includes promoting transparency in financial reporting and seeking efficiencies to maximize the city's financial stability and sustainability.

10. Community Relations

City Managers play a pivotal role in fostering positive relationships with neighboring communities, stakeholders, and regional partners. This competency assesses their ability to collaborate on regional issues, promote intergovernmental cooperation, and represent the city's interests in external forums. It includes supporting community development initiatives, addressing regional challenges, and advocating for policies that enhance the city's long-term viability and quality of life.

These descriptions reflect the multifaceted expectations placed on City Managers to effectively lead and manage municipal operations while fostering positive relationships with stakeholders and promoting good governance practices.

Evaluation Criteria and Ratings

Each of the 10 core competencies above shall have 4-6 evaluation criteria (questions) identified. Questions shall be reviewed and approved by the City Council, prior to distribution. As necessary, Council shall update the questions, to reflect the needs of the City.

Each evaluation criteria (question) shall be assessed on a scale of 1 to 5. 1 representing a failure to meet expectations and 5 representing a consistency to exceed expectations. An additional "N" for Not Observed has been added. Further details on the 5 point scale and calculations are listed in "INSTRUCTIONS" subsection of this process document.

Note: Outlier Scores require specific examples, as to why the evaluator felt that a "5" or a "1", was appropriate. The Mayor or Council President will follow-up with the evaluator on any scores of a "5" or "1" submitted without justification.

Specific City Council Objectives:

Each specific City Council objective shall be rated on the following criteria:

1. Was the objective completed to the degree expected? (Yes/No)
2. Was the objective completed within the time allotted? (Yes/No)

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3. Was the objected completed in a manner that is satisfactory to the City Council (assessed on a scale of 1 to 5)
4. Note: Narrative feedback from City Council is important for this category, especially if the City Manager's actions were not aligned with City Council's expectations.

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Development Plans

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If a quorum of the returned evaluations, for a specific Core Competency or evaluation criteria is a 2 or lower (Below Expectations), the Mayor and Council President shall meet to review and identify next steps in initiating a Development Plan discussion with the City Council.

Example:

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exercise good judgment in decision-making.

4 Councilors and the Mayor score a 2 or less.

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2 Councilors scored a 4 or higher

2 Councilors scored a 3

Result - 5 out of 9 elected evaluators provided an evaluation of 2 or less on the same evaluation criteria. This would trigger the City Council to determine whether it is appropriate to provide a development plan for this area.

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Feedback Requests

Elected Officials

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Elected Officials (Mayor and City Councilors) shall be provided either an electronic or paper form of the City Manager's Annual Performance Evaluation Form, as shown in Appendix A. This form shall be returned to the Mayor, City Council President, or their designee.

Department Heads

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The Mayor and/or City Council President shall provide the Department Heads with an electronic or paper form of the City Manager's Annual Performance Evaluation Form, as shown in Appendix B. The form shall be written in a way that supports the completion of the evaluation, relevant to areas of leadership, staffing, and otherwise as appropriate. Any feedback provided by Department Heads or other direct reports of the City Manager, shall be kept confidential to enable open and honest feedback, without fear of retribution. The feedback should focus on providing the Mayor and City Council with

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visibility into aspects relevant to the City Manager's evaluations, for which the City Council would not have reasonable visibility.

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INSTRUCTIONS

The evaluation form contains ten (10) core competencies and their expected standards of performance for each. A 5 point scale is used to rate each of the behavioral standards.

Using the following scale, indicate your rating of the City Manager’s performance for each category.

Any item left blank will be assigned a score of N (Not Observed). Use whole digits; fractions will be rounded down (e.g., 3.5 will be entered as a 3).

Rating Scale	Definition
5 - Outstanding	Consistently exceeds targets and standards
4 – Exceeds Expectations	Above average performance in meeting standards
3 – Meets Expectations	Performance meets established standards.
2 – Below Expectations	Performance occasionally falls short of standards.
1 - Unsatisfactory	Performance consistently fails to meet standards.
N – Not Observed	Not enough observation or information to evaluate performance

In each Core Competency, add all scores in that Competency and divide by the number of categories rated to arrive at a single score for the competency.

In addition to assigning a numerical rating to specific items within a Core Competency, this evaluation form also contains sections for entering narrative comments, including the opportunity to respond to specific questions and to include any specific examples of observed behavior which support your rating and are pertinent to the evaluation period. Additional pages may be added if necessary. Please write legibly. All evaluation forms must be submitted prior to the deadline identified on the cover page. Submitted forms will be summarized into a single performance evaluation to be presented and discussed by the City Council and the City Manager.

Please submit the form as follows:

- Leave all pages of the evaluation form attached
- Initial each page
- Sign and date the cover page
- Enter the date the evaluation was submitted in the space provided on the cover page

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Core Competencies

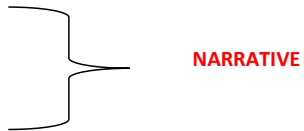
1. CORE COMPETENCY



RATING

NOTE: For a rating of 1 or 5, please provide or cite an example or instance in the space below. Add and enter the numerical values from above _____ ÷ by 5= _____ is your score for this category.

ADDITIONAL COMMENTS:



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Core Competencies

1. INDIVIDUAL CHARACTERISTICS

- _____ Diligent and thorough in the discharge of duties; a "self-starter".
- _____ Exercises good judgment.
- _____ Displays enthusiasm, cooperation and willingness to adapt.
- _____ Displays mental and physical stamina appropriate for the position.
- _____ Composure, appearance and attitude are fitting for an individual in this Executive position. This person is able to separate personal feelings from the advancement of the City's interests.

Add and enter the numerical values from above _____ ÷ by 5= _____ is your score for this category.

NOTE: For a rating of 1 or 5, please provide or cite an example or instance in the space below.

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ADDITIONAL COMMENTS:

_____ Evaluator Initials _____

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2. PROFESSIONAL SKILLS AND STATUS

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

Add and enter the numerical values from above _____ + by 5= _____ is your score for this category.

NOTE: For a rating of 1 or 5, please provide or cite an example or instance in the space below.

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ADDITIONAL COMMENTS:

_____ Evaluator Initials _____

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3. RELATIONS WITH ELECTED MEMBERS OF THE CITY COUNCIL

- _____ Carries out directives of the City Council as a whole as opposed to those of any one member, special interest or minority group.
- _____ Participates in setting City Council meeting agendas which avoids unnecessary Council involvement in administrative actions.
- _____ Disseminates complete and accurate information equally to all Council members in a timely manner.
- _____ Assists by facilitating decision making without usurping authority.
- _____ Responds professionally to requests, advice and constructive criticism and accepts responsibility for undesirable results.

Add and enter the numerical values from above _____ ÷ by 5= _____ is your score for this category.

NOTE: For a rating of 1 or 5, please provide or cite an example or instance in the space below.

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ADDITIONAL COMMENTS:

_____ Evaluator Initials _____

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4. POLICY EXECUTION

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

Add and enter the numerical values from above _____ ÷ by 5= _____ is your score for this category.

_____ **NOTE:** For a rating of 1 or 5, please provide or cite an example or instance in the space below.

ADDITIONAL COMMENTS:

_____ Evaluator Initials _____

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5. REPORTING

- _____ Using the City Charter as a guide, provides regular information and reports to the City Council concerning matters of importance to the local government.
- _____ Responds in a timely manner to requests from the City Council for special reports.
- _____ Takes the initiative to provide information, advice and recommendations to the City Council on matters which are non-routine and not administrative in nature.
- _____ Reports produced by the City Manager are accurate, comprehensive, concise and written to and for their intended audience.
- _____ Produces and handles reports in a way to convey the message that the affairs of the City are open to public review and scrutiny.

Add and enter the numerical values from above _____ ÷ by 5= _____ is your score for this category.

NOTE: For a rating of 1 or 5, please provide or cite an example or instance in the space below.

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ADDITIONAL COMMENTS:

_____ Evaluator Initials _____

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6. CITIZEN RELATIONS

- _____ Responsive in a timely manner to requests and/or complaints from citizens.
- _____ Demonstrates a dedication to service to the community and its citizens.
- _____ Maintains a nonpartisan approach in dealing with the local news media.
- _____ Meets with and listens to members of the community to discuss their concerns and strives to understand their interests.
- _____ Makes an appropriate good-faith effort to maintain citizen satisfaction with city services.

Add and enter the numerical values from above _____ ÷ by 5= _____ is your score for this category

▲ **NOTE:** For a rating of 1 or 5, please provide or cite an example or instance in the space below.

ADDITIONAL COMMENTS:

7

_____ Evaluator Initials _____

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7. STAFFING

- _____ Recruits and retains competent personnel for staff positions.
- _____ Applies an appropriate level of supervision to improve any areas of substandard performance.
- _____ Stays accurately informed and appropriately concerned about employee relations
- _____ Professionally manages the compensation and benefits plan.
- _____ Promotes training and development opportunities for employees at all levels within the organization.

Add and enter the numerical values from above _____ ÷ by 5= _____ is your score for this category.

NOTE: For a rating of 1 or 5, please provide or cite an example or instance in the space below.

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ADDITIONAL COMMENTS:

_____ Evaluator Initials _____

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8. SUPERVISION

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

Add and enter the numerical values from above _____ ÷ by 5= _____ is your score for this category.

NOTE: For a rating of 1 or 5, please provide or cite an example or instance in the space below.

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ADDITIONAL COMMENTS:

_____ Evaluator Initials _____

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9. FISCAL MANAGEMENT

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

Add and enter the numerical values from above _____ + by 5= _____ is your score for this category

NOTE: For a rating of 1 or 5, please provide or cite an example or instance in the space below.

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ADDITIONAL COMMENTS:

_____ Evaluator Initials _____

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10. COMMUNITY RELATIONS

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

Add and enter the numerical values from above _____ ÷ by 5= _____ is your score for this category

NOTE: For a rating of 1 or 5, please provide or cite an example or instance in the space below.

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ADDITIONAL COMMENTS:

_____ Evaluator Initials _____

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NARRATIVE EVALUATION

List three performance objectives for the City Manager that you feel are the most important targets for the upcoming year:

1. _____
2. _____
3. _____

What would you identify as the City Managers strength(s), expressed in terms of the principle results achieved during the review period?

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

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

What constructive suggestion(s) and/or recommendation(s) can you offer to the City Manager to improve performance?

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Appendix A

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Appendix A: Written (Paper) Evaluation and Acknowledgement

CITY MANAGER PERFORMANCE EVALUATION

CITY OF ROSEBURG, OR



INDIVIDUAL BEING EVALUATED _____

EVALUATION PERIOD _____ to _____

REVIEWER'S NAME _____

DATE SUBMITTED _____

Each member of the City Council must complete this evaluation form, sign it in the appropriate space provided above and return it to _____ no later than _____.

All submitted evaluations will be summarized and included on the City Council agenda for discussion.

Mayor

Date

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INSTRUCTIONS

The evaluation form contains ten (10) core competencies and their expected standards of performance for each. A 5 point scale is used to rate each of the behavioral standards.

Using the following scale, indicate your rating of the City Manager's performance for each category.

Any item left blank will be assigned a score of N (Not Observed). Use whole digits; fractions will be rounded down (e.g., 3.5 will be entered as a 3).

<u>Rating Scale</u>	<u>Definition</u>
<u>5 - Outstanding</u>	<u>Consistently exceeds targets and standards</u>
<u>4 – Exceeds Expectations</u>	<u>Above average performance in meeting standards</u>
<u>3 – Meets Expectations</u>	<u>Performance meets established standards.</u>
<u>2 – Below Expectations</u>	<u>Performance occasionally falls short of standards.</u>
<u>1 - Unsatisfactory</u>	<u>Performance consistently fails to meet standards.</u>
<u>N – Not Observed</u>	<u>Not enough observation or information to evaluate performance</u>

In each Core Competency, add all scores in that Competency and divide by the number of categories rated to arrive at a single score for the competency.

In addition to assigning a numerical rating to specific items within a Core Competency, this evaluation form also contains sections for entering narrative comments, including the opportunity to respond to specific questions and to include any specific examples of observed behavior which support your rating and are pertinent to the evaluation period. Additional pages may be added if necessary. Please write legibly. All evaluation forms must be submitted prior to the deadline identified on the cover page. Submitted forms will be summarized into a single performance evaluation to be presented and discussed by the City Council and the City Manager.

Please submit the form as follows:

- Leave all pages of the evaluation form attached
- Initial each page
- Sign and date the cover page
- Enter the date the evaluation was submitted in the space provided on the cover page

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LEGEND

Core Competencies

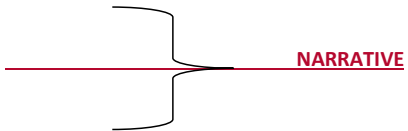
1. CORE COMPETENCY



RATING

NOTE: For a rating of 1 or 5, please provide or cite an example or instance in the space below.
Add and enter the numerical values from above _____ ÷ by 5= _____ is your
score for this category.

ADDITIONAL COMMENTS:



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Core Competencies

1. INDIVIDUAL CHARACTERISTICS

- _____ Diligent and thorough in the discharge of duties; a "self-starter".
- _____ Makes decisions that reflect high ethical standards and integrity.
- _____ Displays enthusiasm, cooperation and willingness to adapt.
- _____ Displays mental and physical stamina appropriate for the position.
- _____ Composure, appearance and attitude are fitting for an individual in this Executive position. This person is able to separate personal feelings from the advancement of the City's interests.

Add and enter the numerical values from above _____ ÷ by 5= _____ is your score for this category.

NOTE: For a rating of 1 or 5, please provide or cite an example or instance in the space below.

ADDITIONAL COMMENTS:

_____ Evaluator Initials

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2. PROFESSIONAL SKILLS AND QUALIFICATIONS

_____ Maintains knowledge of current developments affecting the practice of local government management.

_____ Strategic Thinking: Ability to develop long-term plans and strategies that align with the City's goals and visions.

_____ Understands the technical aspects of municipal services, including public works, safety, zoning, and urban planning.

_____ Leverages technology to improve city operations and services.

_____ Critical Thinking: Analyzing complex issues and developing innovative solutions.

_____ **Decisiveness:** Making timely and informed decisions, even under pressure.

Add and enter the numerical values from above ÷ by 5= _____ is your score for this category.

NOTE: For a rating of 1 or 5, please provide or cite an example or instance in the space below.

ADDITIONAL COMMENTS:

_____ Evaluator Initials

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3. RELATIONS WITH ELECTED MEMBERS OF THE CITY COUNCIL

Carries out directives of the City Council as a whole as opposed to those of any one member, special interest or minority group.

Participates in setting City Council meeting agendas which avoids unnecessary Council involvement in administrative actions.

Disseminates complete and accurate information equally to all Council members in a timely manner.

Assists by facilitating decision making without usurping authority.

Responds professionally to requests, advice and constructive criticism and accepts responsibility for undesirable results.

Builds and maintaining positive relationships with city council members

Add and enter the numerical values from above \div by 5= _____ is your score for this category.

NOTE: For a rating of 1 or 5, please provide or cite an example or instance in the space below.

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4. POLICY EXECUTION

Implements actions and directives in accordance with the intent of the City Council.

Supports the actions of the City Council after a decision has been reached, both inside and outside the organization.

Understands, supports and enforces local government's laws, policies and ordinances.

Reviews ordinance and policy procedures periodically to suggest improvements to their effectiveness.

Offers workable alternatives to the City Council for changes in law or policy when an existing policy or ordinance is no longer practical.

Add and enter the numerical values from above ÷ by 5= is your score for this category.

NOTE: For a rating of 1 or 5, please provide or cite an example or instance in the space below.

ADDITIONAL COMMENTS:

Evaluator Initials

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5. REPORTING

Using the City Charter as a guide, provides regular information and reports to the City Council concerning matters of importance to the local government.

Responds in a timely manner to requests from the City Council for special reports.

Takes the initiative to provide information, advice and recommendations to the City Council on matters which are non-routine and not administrative in nature.

Reports produced by the City Manager are accurate, comprehensive, concise and written to and for their intended audience.

Produces and handles reports in a way to convey the message that the affairs of the City are open to public review and scrutiny.

Add and enter the numerical values from above ÷ by 5= is your score for this category.

NOTE: For a rating of 1 or 5, please provide or cite an example or instance in the space below.

ADDITIONAL COMMENTS:

Evaluator Initials

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6. CITIZEN RELATIONS

Responsive in a timely manner to requests and/or complaints from citizens.

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

Maintains a nonpartisan approach in dealing with the local news media.

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

Makes an appropriate good-faith effort to maintain citizen satisfaction with city services.

Add and enter the numerical values from above _____ ÷ by 5= _____ is your score for this category

NOTE: For a rating of 1 or 5, please provide or cite an example or instance in the space below.

ADDITIONAL COMMENTS:

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Evaluator Initials

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7. STAFFING

Recruits and retains competent personnel for staff positions.

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

Stays accurately informed and appropriately concerned about employee relations

Professionally manages the compensation and benefits plan.

Promotes training and development opportunities for employees at all levels within the organization.

Add and enter the numerical values from above ÷ by 5= is your score for this category.

NOTE: For a rating of 1 or 5, please provide or cite an example or instance in the space below.

ADDITIONAL COMMENTS:

Evaluator Initials

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8. SUPERVISION

Encourages Department Heads to make decisions within their jurisdictions with minimal City Manager involvement, yet maintains general control of operations by providing the appropriate amount of communication to staff.

Instills confidence and promotes initiative in subordinates through supportive rather than restrictive controls of their programs while still monitoring operations at the department level.

Develops and maintains a friendly, informal and professional relationship with the staff and work force in general yet maintains the professional dignity of the office of City Manager.

Sustains or improves staff performance by evaluating the performance of staff members annually, setting goals and objectives for them, periodically assessing their progress and providing appropriate and timely feedback.

Encourages teamwork, innovation and effective problem solving among staff members.

Add and enter the numerical values from above ÷ by 5= is your score for this category.

NOTE: For a rating of 1 or 5, please provide or cite an example or instance in the space below.

ADDITIONAL COMMENTS:

Evaluator Initials

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9. FISCAL MANAGEMENT

Prepares a balanced budget to provide City services at a level directed by the City Council.

Makes the best possible use of available funds, conscious of the need to operate the City efficiently and effectively.

Prepares a budget and budgetary recommendations in an intelligent, accessible manner understood by the City Council.

Ensures actions and decisions reflect an appropriate level of responsibility for financial planning and accountability.

Appropriately monitors and manages fiscal activities of the City.

Add and enter the numerical values from above ÷ by 5= is your score for this category

NOTE: For a rating of 1 or 5, please provide or cite an example or instance in the space below.

ADDITIONAL COMMENTS:

Evaluator Initials

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10. COMMUNITY RELATIONS

Shares responsibility for addressing the difficult issues facing the city.

Avoids unnecessary controversy.

Cooperates with neighboring communities and the county.

Helps the Council address future needs and development appropriate plans to address long term trends.

Cooperates with other regional, state and federal government agencies.

Add and enter the numerical values from above ÷ by 5= is your score for this category

NOTE: For a rating of 1 or 5, please provide or cite an example or instance in the space below.

ADDITIONAL COMMENTS:

Evaluator Initials

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NARRATIVE EVALUATION

List three performance objectives for the City Manager that you feel are the most important targets for the upcoming year:

1. _____
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What performance area(s) would you identify as most critical for success?

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

What constructive suggestion(s) and/or recommendation(s) can you offer to the City Manager to improve performance?

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Appendix B: Department Head Feedback

• Leadership and Direction:

- How effectively does the City Manager provide clear leadership and direction to the organization and to your department specifically?
- Can you provide examples of how the City Manager has supported your department's goals and initiatives?

• Communication and Collaboration:

- How well does the City Manager communicate priorities, expectations, and decisions to department heads and staff?
- How responsive is the City Manager to departmental needs and concerns?

• Support and Resource Allocation:

- How effectively does the City Manager allocate resources (financial, human, and other resources) to support your department's operations and initiatives?
- Can you describe instances where the City Manager has facilitated your department's success through resource management?

• Decision-Making and Problem-Solving:

- How confident are you in the City Manager's ability to make decisions that benefit the organization and address challenges effectively?
- Can you provide examples of critical decisions made by the City Manager that have impacted your department positively or negatively?

• Professional Development and Support:

- How does the City Manager support the professional development and growth of department heads and staff?
- In what ways does the City Manager foster a positive and productive work environment for your department?

• Relationships and Stakeholder Engagement:

- How well does the City Manager collaborate with other departments and stakeholders to achieve common goals?
- Can you assess the City Manager's ability to maintain effective relationships with elected officials, community leaders, and other external stakeholders?

• Performance Management and Accountability:

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- How does the City Manager hold department heads and staff accountable for their performance and outcomes?
- Can you provide examples of how the City Manager has addressed performance issues within your department?

• Vision and Strategic Planning:

- How well does the City Manager articulate and implement a vision for the organization's future?
- Can you discuss how the City Manager involves department heads in strategic planning and decision-making processes?

• Ethical Standards and Integrity:

- How does the City Manager demonstrate ethical behavior and integrity in their interactions with department heads, staff, and external stakeholders?
- Can you provide examples where the City Manager has upheld ethical standards and promoted a culture of integrity within the organization?

• Overall Impact and Effectiveness:

- From your perspective as a department head, how would you rate the overall performance of the City Manager in leading the organization?
- What are the City Manager's strengths and areas for improvement, particularly as they relate to your department and its operations?

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08/08/2024 - DISCUSSION ITEMS A
ATTACHMENT NO. 2

CITY MANAGER PERFORMANCE EVALUATION

CITY OF ROSEBURG, OR



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INTRODUCTION

The City of Roseburg and the League of Oregon Cities (LOC) emphasize that a well-executed performance review process for City Managers is essential for promoting good governance, ensuring effective leadership, and advancing the interests of the community served by the city government.

Commented [JDVW1]: Does the language used come from LOC?

PURPOSE

The purpose of the Performance Evaluation is to provide feedback on the job performance of the City Manager and, if necessary, create a development plan for areas of improvement. It may also be used to provide a basis for merit increases.

1. **Accountability and Oversight:** The performance review process provides a structured mechanism for evaluating the City Manager's performance against established goals, objectives, and competencies. This accountability ensures that the City Manager's actions and decisions align with the city's strategic priorities and policies set forth by the City Council.
2. **Feedback and Improvement:** It offers a platform for providing constructive feedback to the City Manager on their performance. This feedback not only acknowledges successes but also identifies areas for improvement and professional growth. By pinpointing strengths and weaknesses, the review process helps the City Manager enhance their effectiveness in managing city affairs.
3. **Relationship Building:** The review process fosters a stronger working relationship between the City Manager and the City Council. It promotes open communication, transparency, and mutual understanding of expectations, thereby facilitating better collaboration in governance and decision-making.
4. **Development of Professional Goals:** It assists in setting clear and measurable goals for the City Manager, aligned with the city's strategic plan. These goals help guide the City Manager's efforts in achieving desired outcomes and addressing challenges faced by the community.
5. **Public Confidence:** By demonstrating accountability and transparency in evaluating the City Manager's performance, the review process helps maintain and enhance public trust in local government. It shows stakeholders that city leadership is committed to effective governance and the responsible use of public resources.

Commented [JDVW2]: Should this be Council goals?

GUIDELINES AND BEST PRACTICES

The City of Roseburg provides the following guidelines and best practices, based on recommendations and standards from the LOC, International Standards Organization (ISO) and Society for Human Resource Management (SHRM) for evaluating the performance of City Managers, aiming to ensure fairness, effectiveness, and alignment with the city's strategic goals. Here are some key recommendations and standards typically emphasized:

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1. **Clear Performance Criteria:** Define specific performance criteria and expectations for the City Manager based on their role, responsibilities, and the city's strategic plan. This includes core competencies such as leadership, communication, fiscal management, community relations, and operational effectiveness.
2. **Regular Feedback:** Implement a regular feedback mechanism throughout the year, not just during formal evaluations. This can include quarterly reviews or informal check-ins to discuss progress, challenges, and achievements.
3. **Objective Evaluation Process:** Use a structured evaluation process that incorporates both quantitative (e.g., metrics, targets) and qualitative assessments (e.g., narrative feedback, examples of performance). Ensure the evaluation criteria are clear, measurable, and aligned with the city's priorities.
4. **360-Degree Feedback:** Encourage input from various stakeholders, including City Council members, city staff, community leaders, and sometimes residents. This holistic approach provides a comprehensive view of the City Manager's performance and impact.
5. **Goal Setting and Development Planning:** Set SMART goals (Specific, Measurable, Achievable, Relevant, Time-bound) for the City Manager that reflect both short-term priorities and long-term strategic objectives. Develop a professional development plan based on identified strengths and areas for improvement.
6. **Transparency and Documentation:** Maintain transparency throughout the evaluation process by documenting discussions, feedback, and outcomes. Ensure that evaluation results and any associated decisions are communicated effectively to stakeholders.
7. **Performance Review Timeline:** Establish a consistent timeline for conducting evaluations, ensuring they occur at regular intervals that allow for meaningful reflection and adjustment of goals as needed.
8. **Legal and Ethical Compliance:** Ensure that the evaluation process complies with legal requirements, such as employment contracts and local government regulations. Uphold ethical standards in conducting evaluations, respecting confidentiality and fairness.
9. **Continuous Improvement:** Regularly review and refine the evaluation process based on feedback from stakeholders and evolving best practices. Adapt the process to meet changing circumstances and challenges faced by the city.

By adhering to these recommendations and standards, Roseburg enhances the City Manager evaluation process, strengthen governance practices, and ultimately improve the delivery of services to the community.

Commented [JDVV3]: This is a process change – is Council agreed?

Commented [JDVV4]: Process change. How is this information collected, weighted, scored? Formal or informal?

Commented [JDVV5]: Process change. Who develops this plan and by what process?

Commented [JDVV6]: How and by what process? Confidentiality/Executive Session concerns?

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ROLES AND RESPONSIBILITIES

City Council:

- **Overall Oversight:** The City Council holds the primary responsibility for evaluating the City Manager. They define the evaluation process, establish evaluation criteria, and ensure that the evaluation is conducted fairly and transparently.
- **Participation in Evaluation:** Council members individually evaluate the City Manager's performance based on established criteria. They may also participate in group discussions or interviews related to the evaluation.

Commented [JDVW7]: How do group discussion occur? Public meeting concerns?

City Council President:

- **Receive, Compile, and Distribute Feedback:** The Council President is responsible for receiving and compiling all feedback on the City Manager's evaluation, and distributing it the compiled, feedback to the City Council, Mayor, and City Manager, as appropriate.
- **Development Plan:** If necessary and appropriate, the Council President shall engage and coordinate with the Mayor, if a quorum of received feedback, indicates an expectation(s) is not being met.
- **Participation in Evaluation:** Council President provides their own evaluation of the City Manager's performance and may lead discussions during council meetings regarding the evaluation outcomes.
- **City Council Onboarding:** In coordination with the Mayor and HR Director, the Council President will be responsible for ensuring that all newly elected City Council members are made aware of the City Manager Evaluation process.

Commented [JDVW8]: Feels like the Mayor's role. Executive session material in a public meeting?

Mayor:

- **Facilitator:** The Mayor facilitates the evaluation process, ensuring that it proceeds according to established procedures and timelines.
- **City Council Onboarding:** In coordination with the Mayor and HR Director, the Council President will be responsible for ensuring that all newly elected City Council members are made aware of the City Manager Evaluation process.
- **Input and Feedback:** The Mayor provides their own evaluation of the City Manager's performance and may lead discussions during council meetings regarding the evaluation outcomes.
- **Development Plan:** if necessary and as appropriate, the Mayor shall facilitate the Development Plan process.
- **Annual Review of Process:** Annually, the Mayor shall direct the Council President and all interested Council Members to review the City Manager Evaluation process, and bring back any recommendations to the City Council for approval.

Commented [JDVW9]: Is this necessary annually?

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City Manager:

- **Quarterly Update:** Once a quarter, in an executive session, provide an update to the City Council and Mayor on progress of goals and objectives.
- **Annual Update:** Annually, provide an update to the City Council and Mayor on progress of goals and objectives.
- **Participation in Discussion:** The City Manager participates in discussions related to their performance evaluation, providing context, examples, and responses to feedback.

Commented [JDVW10]: New/process change. Agreed by Council? Does goal update fit executive session?

City Staff and Department Heads:

- **Input and Feedback:** Relevant city staff and department heads may provide input into the City Manager's evaluation process, especially regarding their interactions and collaboration with the City Manager.

Commented [JDVW11]: New/process change

City of Roseburg Human Resources Director:

- **Trusted Advisor:** As appropriate, the HR Director may act as a subject matter expert and assist with coordinating the City Manager's performance review process, as long as it doesn't create a conflict of interest as a direct report to the City Manager.

Responsibilities:

Commented [JDVW12]: Are these Council responsibilities?

1. **Establish Evaluation Criteria:** Define clear and objective criteria for evaluating the City Manager's performance. This includes setting goals, specific objectives, competencies, and standards that reflect the city's strategic priorities and expectations.
2. **Conduct Evaluations:** Ensure that evaluations are conducted at regular intervals as defined by city policies or employment contracts. This may include annual evaluations, periodic reviews, or feedback sessions throughout the year.
3. **Collect Feedback:** Gather feedback from various stakeholders, including council members, city staff, community leaders, and sometimes residents. This feedback provides a comprehensive view of the City Manager's performance and impact.
4. **Review Documentation:** Review documentation related to the City Manager's performance, including reports, metrics, and other relevant information. Ensure that documentation is accurate, comprehensive, and supports evaluation findings.
5. **Provide Constructive Feedback:** Offer constructive feedback to the City Manager based on evaluation outcomes. Highlight strengths and achievements while identifying areas for improvement and professional development.
6. **Develop Action Plans:** Collaborate with the City Manager to develop action plans for improvement, if necessary. These plans should outline specific goals, timelines, and resources needed to address identified areas of concern.
7. **Communicate Evaluation Results:** Communicate evaluation results and decisions to the City Manager in a clear and respectful manner. Ensure that any decisions related to compensation,

Commented [JDVW13]: How is feedback collected?

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contract renewal, or performance improvement are communicated according to established protocols.

8. **Monitor Progress:** Monitor the City Manager's progress towards achieving goals and addressing areas for improvement identified during the evaluation. Provide ongoing support and feedback as needed throughout the evaluation period.

By clearly defining roles and responsibilities and following established procedures, the City of Roseburg can ensure that the City Manager evaluation process is fair, objective, and contributes to effective governance and leadership.

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PROCESS

Performance evaluations are based on performance standards that address the competencies, skills and expected outcomes necessary for being an effective City Manager. These standards define the level at which the City Manager must perform their job duties to meet the Council's expectations. Performance evaluations should include positive feedback as well as areas for improvement and examples of observed behavior.

The Council and Mayor should meet periodically to monitor the performance of the organization and the City Manager. The City Of Roseburg has determined that the City Manager job performance review and evaluation process will take place as follows:

1. A **quarterly executive session** at which time the City Council will review the job performance of the City Manager. This is an oral review session intended to provide the opportunity for discussion with input from both the Council and the City Manager. Core competencies as described in Performance Evaluation Form should be used to guide this group discussion. Specific examples should be used during this discussion to ensure clarity and meaningful feedback. These quarterly performance reviews provide for open communication and progress checks, as well as a basis for the formal annual performance evaluation. Quarterly evaluations will not take place during the October – December quarter while the formal annual evaluation is in progress.
2. **Annually**, beginning in the fall and concluding by the end of the calendar year, there will be a formal written process where each Councilor will complete this, or a similar form, which will then be used as the formal, official Performance Evaluation. At the time of the formal review, there should be no surprises to either the City Council or the City Manager. The entire City Council and the City Manager have input into the performance evaluation. This gives both parties the opportunity to be heard and to provide honest input and make the performance evaluation a joint process.
3. **Each year, not later than 30 days of the evaluation, City Council will establish specific objectives for the City Manager for the upcoming year. These objectives may include issues that are beyond the Council's stated goals. These objectives will be included on the evaluation form and shall be part of the performance review.**

Commented [JDVW14]: New/process change

Commented [JDVW15]: New/process change. How and by what process? Public meeting?

Commented [EP16]: Do we want these to be part of the form or as an attachment since these objectives will likely change each year?

Timelines

First Meeting in July:

In July, the City Manager will present a report on the accomplishments of Council Goals and Objectives adopted by the City Council.

Late July/Early August:

The Mayor and City Councilors may meet one-on-one with the City Manager as necessary, to discuss aspects of the City Manager's performance during the past year. The City Manager and the Mayor/Councilor may discuss individually any performance concerns during their one-on-one meetings.

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Late July / Early August:

City Manager performance review feedback forms or surveys are distributed to the Mayor, City Council, and Department Heads.

Late-August:

Completed feedback forms are submitted to the Council President and/or Mayor in sufficient time to be consolidated into one report for inclusion in the City Council agenda packet for next appropriate meeting.

If the Mayor and Council President identify that a quorum of feedback on any one evaluated area is rated at or below a "2", they will determine whether an executive session is necessary to discuss the City Manager's performance, as appropriate and within law and established practices.

August/Early September:

The City Manager's performance appraisal is conducted. The City Manager has the right to choose whether this shall be done in open session or in executive session.

Evaluation of Core Competencies

The City of Roseburg has identified that the City Manager shall be evaluated on the specific objectives outlined by City Council each year as well as the 10 Core Competencies below:

1. Individual Characteristics and Behaviors

City Managers are expected to exhibit personal qualities such as diligence, integrity, and a proactive approach to their duties. They should demonstrate sound judgment, maintain composure, and uphold a professional demeanor that aligns with the responsibilities of their executive position. This competency assesses their ability to effectively manage themselves and their conduct in representing the city's interests.

2. Professional Skills and Qualifications

This competency evaluates the City Manager's expertise and qualifications in local government management. It includes their knowledge of current practices, laws, and regulations affecting municipal operations. City Managers are expected to demonstrate innovation, analytical skills, and the ability to apply strategic thinking to problem-solving and decision-making within the context of city governance.

3. Relations with elected members of the City Council and Mayor

City Managers must effectively collaborate with elected officials to carry out the city's policies and priorities. This competency evaluates their ability to facilitate communication, provide

Commented [JDVW17]: Should this read executive session materials?

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timely and accurate information, and support the Council's decision-making process. It emphasizes professionalism, responsiveness, and the capacity to navigate complex political dynamics while maintaining neutrality and respect for democratic governance.

4. Policy Development and Execution

City Managers are responsible for translating Council directives into actionable policies and initiatives that reflect community needs and priorities. This competency assesses their skill in drafting, implementing, and evaluating policies that align with legal requirements and support the city's strategic objectives. It includes the ability to anticipate challenges, propose solutions, and adapt policies as necessary to address evolving circumstances.

5. Reporting

Effective reporting by City Managers involves timely and transparent communication with the City Council and community stakeholders. This competency evaluates their ability to provide accurate and comprehensive reports that inform decision-making, demonstrate accountability, and ensure public access to relevant information. Reports should be clear, concise, and tailored to meet the informational needs of diverse audiences.

6. Citizen Relations

City Managers are expected to engage with residents and community groups in a responsive and respectful manner. This competency assesses their dedication to public service, ability to address citizen inquiries and concerns promptly, and commitment to maintaining open lines of communication. It includes efforts to foster public trust, promote civic participation, and uphold the city's reputation for responsiveness and accountability.

7. Staffing

This competency evaluates the City Manager's role in recruiting, retaining, and managing a competent and motivated workforce. It includes overseeing personnel policies, promoting professional development opportunities, and maintaining a positive organizational culture. City Managers should demonstrate fair and effective management practices that support employee morale, productivity, and commitment to delivering quality public services.

8. Supervision

City Managers must provide effective leadership to department heads and staff, encouraging initiative, collaboration, and innovation while maintaining overall operational oversight. This competency assesses their ability to delegate responsibilities, provide constructive feedback, and empower staff to achieve departmental goals. It emphasizes fostering a supportive and inclusive work environment that values diversity, teamwork, and professional growth.

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9. Fiscal Management

Sound fiscal management by City Managers involves preparing and administering budgets that align with Council priorities and community needs. This competency evaluates their ability to allocate resources responsibly, monitor financial performance, and ensure compliance with fiscal policies and legal requirements. It includes promoting transparency in financial reporting and seeking efficiencies to maximize the city's financial stability and sustainability.

10. Community Relations

City Managers play a pivotal role in fostering positive relationships with neighboring communities, stakeholders, and regional partners. This competency assesses their ability to collaborate on regional issues, promote intergovernmental cooperation, and represent the city's interests in external forums. It includes supporting community development initiatives, addressing regional challenges, and advocating for policies that enhance the city's long-term viability and quality of life.

These descriptions reflect the multifaceted expectations placed on City Managers to effectively lead and manage municipal operations while fostering positive relationships with stakeholders and promoting good governance practices.

Evaluation Criteria and Ratings

Each of the 10 core competencies above shall have 4-6 evaluation criteria (questions) identified. Questions shall be reviewed and approved by the City Council, prior to distribution. As necessary, Council shall update the questions, to reflect the needs of the City.

Each evaluation criteria (question) shall be assessed on a scale of 1 to 5. 1 representing a failure to meet expectations and 5 representing a consistency to exceed expectations. An additional "N" for Not Observed has been added. Further details on the 5 point scale and calculations are listed in "INSTRUCTIONS" subsection of this process document.

Note: Outlier Scores require specific examples, as to why the evaluator felt that a "5" or a "1", was appropriate. The Mayor or Council President will follow-up with the evaluator on any scores of a "5" or "1" submitted without justification.

Specific City Council Objectives:

Each specific City Council objective shall be rated on the following criteria:

1. Was the objective completed to the degree expected? (Yes/No)
2. Was the objective completed within the time allotted? (Yes/No)

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3. Was the objective completed in a manner that is satisfactory to the City Council (assessed on a scale of 1 to 5)
4. Note: Narrative feedback from City Council is important for this category, especially if the City Manager's actions were not aligned with City Council's expectations.

Development Plans

If a quorum of the returned evaluations, for a specific Core Competency or evaluation criteria is a 2 or lower (Below Expectations), the Mayor and Council President shall meet to review and identify next steps in initiating a Development Plan discussion with the City Council.

Commented [JDVW18]: Should this be average score rather than quorum?

Example:

_____ exercise good judgment in decision-making.

4 Councilors and the Mayor score a 2 or less.

2 Councilors scored a 4 or higher

2 Councilors scored a 3

Result - 5 out of 9 elected evaluators provided an evaluation of 2 or less on the same evaluation criteria. This would trigger the City Council to determine whether it is appropriate to provide a development plan for this area.

Feedback Requests

Elected Officials

Elected Officials (Mayor and City Councilors) shall be provided either an electronic or paper form of the City Manager's Annual Performance Evaluation Form, as shown in [Appendix A](#). This form shall be returned to the Mayor, City Council President, or their designee.

Commented [JDVW19]: We'll need a process to ensure original materials are retained as public record

Department Heads

Commented [JDVW20]: New/process change

The Mayor and/or City Council President shall provide the Department Heads with an electronic or paper form of the City Manager's Annual Performance Evaluation Form, as shown in [Appendix B](#). The form shall be written in a way that supports the completion of the evaluation, relevant to areas of leadership, staffing, and otherwise as appropriate. Any feedback provided by Department Heads or other direct reports of the City Manager, shall be kept confidential to enable open and honest feedback, without fear of retribution. The feedback should focus on providing the Mayor and City Council with

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visibility into aspects relevant to the City Manager's evaluations, for which the City Council would not have reasonable visibility.

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INSTRUCTIONS

The evaluation form contains ten (10) core competencies and their expected standards of performance for each. A 5 point scale is used to rate each of the behavioral standards.

Using the following scale, indicate your rating of the City Manager's performance for each category.

Any item left blank will be assigned a score of N (Not Observed). Use whole digits; fractions will be rounded down (e.g., 3.5 will be entered as a 3).

Rating Scale	Definition
5 - Outstanding	Consistently exceeds targets and standards
4 – Exceeds Expectations	Above average performance in meeting standards
3 – Meets Expectations	Performance meets established standards.
2 – Below Expectations	Performance occasionally falls short of standards.
1 - Unsatisfactory	Performance consistently fails to meet standards.
N – Not Observed	Not enough observation or information to evaluate performance

In each Core Competency, add all scores in that Competency and divide by the number of categories rated to arrive at a single score for the competency.

In addition to assigning a numerical rating to specific items within a Core Competency, this evaluation form also contains sections for entering narrative comments, including the opportunity to respond to specific questions and to include any specific examples of observed behavior which support your rating and are pertinent to the evaluation period. Additional pages may be added if necessary. Please write legibly. All evaluation forms must be submitted prior to the deadline identified on the cover page. Submitted forms will be summarized into a single performance evaluation to be presented and discussed by the City Council and the City Manager.

Please submit the form as follows:

- Leave all pages of the evaluation form attached
- Initial each page
- Sign and date the cover page
- Enter the date the evaluation was submitted in the space provided on the cover page

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LEGEND

Core Competencies

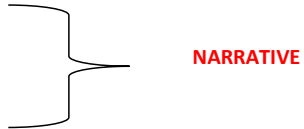
1. CORE COMPETENCY



RATING

NOTE: For a rating of 1 or 5, please provide or cite an example or instance in the space below. Add and enter the numerical values from above _____ ÷ by Number of questions rated = _____ is your score for this category.

ADDITIONAL COMMENTS:



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Appendix A: Written (Paper) Evaluation and Acknowledgement

CITY MANAGER PERFORMANCE EVALUATION

CITY OF ROSEBURG, OR



INDIVIDUAL BEING EVALUATED _____

EVALUATION PERIOD _____ to _____

REVIEWER'S NAME _____

DATE SUBMITTED _____

Each member of the City Council must complete this evaluation form, sign it in the appropriate space provided above and return it to _____ no later than _____.

All submitted evaluations will be summarized and included on the City Council _____ agenda for discussion.

Mayor

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Date

INSTRUCTIONS

The evaluation form contains ten (10) core competencies and their expected standards of performance for each. A 5 point scale is used to rate each of the behavioral standards.

Using the following scale, indicate your rating of the City Manager's performance for each category.

Any item left blank will be assigned a score of N (Not Observed). Use whole digits; fractions will be rounded down (e.g., 3.5 will be entered as a 3).

Rating Scale	Definition
5 - Outstanding	Consistently exceeds targets and standards
4 – Exceeds Expectations	Above average performance in meeting standards
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2 – Below Expectations	Performance occasionally falls short of standards.
1 - Unsatisfactory	Performance consistently fails to meet standards.
N – Not Observed	Not enough observation or information to evaluate performance

In each Core Competency, add all scores in that Competency and divide by the number of categories rated to arrive at a single score for the competency.

In addition to assigning a numerical rating to specific items within a Core Competency, this evaluation form also contains sections for entering narrative comments, including the opportunity to respond to specific questions and to include any specific examples of observed behavior which support your rating and are pertinent to the evaluation period. Additional pages may be added if necessary. Please write legibly. All evaluation forms must be submitted prior to the deadline identified on the cover page. Submitted forms will be summarized into a single performance evaluation to be presented and discussed by the City Council and the City Manager.

Please submit the form as follows:

- Leave all pages of the evaluation form attached
- Initial each page
- Sign and date the cover page
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LEGEND

Core Competencies

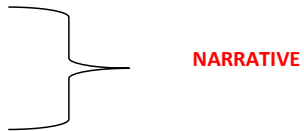
1. CORE COMPETENCY



RATING

NOTE: For a rating of 1 or 5, please provide or cite an example or instance in the space below. Add and enter the numerical values from above _____ ÷ by Number of questions scored= _____ is your score for this category.

ADDITIONAL COMMENTS:



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Core Competencies

1. INDIVIDUAL CHARACTERISTICS

- _____ Diligent and thorough in the discharge of duties; a “self-starter”.
- _____ Makes decisions that reflect high ethical standards and integrity.
- _____ Displays enthusiasm, cooperation and willingness to adapt.
- _____ Displays mental and physical stamina appropriate for the position.
- _____ Composure, appearance and attitude are fitting for an individual in this Executive position. This person is able to separate personal feelings from the advancement of the City’s interests.

Add and enter the numerical values from above _____ ÷ by Number of questions scored = _____ is your score for this category.

NOTE: For a rating of 1 or 5, please provide or cite an example or instance in the space below.

ADDITIONAL COMMENTS:

Evaluator Initials _____

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2. PROFESSIONAL SKILLS AND QUALIFICATIONS

_____ Maintains knowledge of current developments affecting the practice of local government management.

_____ Strategic Thinking: Ability to develop long-term plans and strategies that align with the City's goals and visions.

_____ Understands the technical aspects of municipal services, including public works, safety, zoning, and urban planning.

_____ Leverages technology to improve city operations and services.

_____ Critical Thinking: Analyzing complex issues and developing innovative solutions.

_____ **Decisiveness:** Making timely and informed decisions, even under pressure.

Add and enter the numerical values from above _____ ÷ by Number of questions scored = _____ is your score for this category.

NOTE: For a rating of 1 or 5, please provide or cite an example or instance in the space below.

ADDITIONAL COMMENTS:

Evaluator Initials _____

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3. RELATIONS WITH ELECTED MEMBERS OF THE CITY COUNCIL

- _____ Carries out directives of the City Council as a whole as opposed to those of any one member, special interest or minority group.
- _____ Participates in setting City Council meeting agendas which avoids unnecessary Council involvement in administrative actions.
- _____ Disseminates complete and accurate information equally to all Council members in a timely manner.
- _____ Assists by facilitating decision making without usurping authority.
- _____ Responds professionally to requests, advice and constructive criticism and accepts responsibility for undesirable results.
- _____ Builds and maintaining positive relationships with city council members

Add and enter the numerical values from above _____ ÷ by Number of questions scored = _____ is your score for this category.

NOTE: For a rating of 1 or 5, please provide or cite an example or instance in the space below.

ADDITIONAL COMMENTS:

Evaluator Initials _____

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4. POLICY EXECUTION

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

Add and enter the numerical values from above _____ ÷ by Number of questions scored = _____ is your score for this category.

NOTE: For a rating of 1 or 5, please provide or cite an example or instance in the space below.

ADDITIONAL COMMENTS:

Evaluator Initials _____

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5. REPORTING

- _____ Using the City Charter as a guide, provides regular information and reports to the City Council concerning matters of importance to the local government.
- _____ Responds in a timely manner to requests from the City Council for special reports.
- _____ Takes the initiative to provide information, advice and recommendations to the City Council on matters which are non-routine and not administrative in nature.
- _____ Reports produced by the City Manager are accurate, comprehensive, concise and written to and for their intended audience.
- _____ Produces and handles reports in a way to convey the message that the affairs of the City are open to public review and scrutiny.

Add and enter the numerical values from above _____ ÷ by Number of questions scored = _____ is your score for this category.

NOTE: For a rating of 1 or 5, please provide or cite an example or instance in the space below.

ADDITIONAL COMMENTS:

Evaluator Initials _____

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6. CITIZEN RELATIONS

- _____ Responsive in a timely manner to requests and/or complaints from citizens.
- _____ Demonstrates a dedication to service to the community and its citizens.
- _____ Maintains a nonpartisan approach in dealing with the local news media.
- _____ Meets with and listens to members of the community to discuss their concerns and strives to understand their interests.
- _____ Makes an appropriate good-faith effort to maintain citizen satisfaction with city services.

Add and enter the numerical values from above _____ ÷ by Number of questions scored = _____ is your score for this category

NOTE: For a rating of 1 or 5, please provide or cite an example or instance in the space below.

ADDITIONAL COMMENTS:

Evaluator Initials _____

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7. STAFFING

- _____ Recruits and retains competent personnel for staff positions.
- _____ Applies an appropriate level of supervision to improve any areas of substandard performance.
- _____ Stays accurately informed and appropriately concerned about employee relations
- _____ Professionally manages the compensation and benefits plan.
- _____ Promotes training and development opportunities for employees at all levels within the organization.

Add and enter the numerical values from above _____ ÷ by Number of questions scored = _____ is your score for this category.

NOTE: For a rating of 1 or 5, please provide or cite an example or instance in the space below.

ADDITIONAL COMMENTS:

Evaluator Initials _____

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8. SUPERVISION

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

Add and enter the numerical values from above _____ ÷ by Number of questions scored = _____ is your score for this category.

NOTE: For a rating of 1 or 5, please provide or cite an example or instance in the space below.

ADDITIONAL COMMENTS:

Evaluator Initials _____

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9. FISCAL MANAGEMENT

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

Add and enter the numerical values from above _____ ÷ by Number of questions scored = _____ is your score for this category

NOTE: For a rating of 1 or 5, please provide or cite an example or instance in the space below.

ADDITIONAL COMMENTS:

Evaluator Initials _____

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10. COMMUNITY RELATIONS

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

Add and enter the numerical values from above _____ ÷ by Number of questions scored = _____ is your score for this category

NOTE: For a rating of 1 or 5, please provide or cite an example or instance in the space below.

ADDITIONAL COMMENTS:

Evaluator Initials _____

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NARRATIVE EVALUATION

List three performance objectives for the City Manager that you feel are the most important targets for the upcoming year:

1. _____
2. _____
3. _____

What would you identify as the City Managers strength(s), expressed in terms of the principle results achieved during the review period?

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

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

What constructive suggestion(s) and/or recommendation(s) can you offer to the City Manager to improve performance?

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Appendix B: Department Head Feedback

- **Leadership and Direction:**

- How effectively does the City Manager provide clear leadership and direction to the organization and to your department specifically?
- Can you provide examples of how the City Manager has supported your department's goals and initiatives?

- **Communication and Collaboration:**

- How well does the City Manager communicate priorities, expectations, and decisions to department heads and staff?
- How responsive is the City Manager to departmental needs and concerns?

- **Support and Resource Allocation:**

- How effectively does the City Manager allocate resources (financial, human, and other resources) to support your department's operations and initiatives?
- Can you describe instances where the City Manager has facilitated your department's success through resource management?

- **Decision-Making and Problem-Solving:**

- How confident are you in the City Manager's ability to make decisions that benefit the organization and address challenges effectively?
- Can you provide examples of critical decisions made by the City Manager that have impacted your department positively or negatively?

- **Professional Development and Support:**

- How does the City Manager support the professional development and growth of department heads and staff?
- In what ways does the City Manager foster a positive and productive work environment for your department?

- **Relationships and Stakeholder Engagement:**

- How well does the City Manager collaborate with other departments and stakeholders to achieve common goals?
- Can you assess the City Manager's ability to maintain effective relationships with elected officials, community leaders, and other external stakeholders?

- **Performance Management and Accountability:**

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- How does the City Manager hold department heads and staff accountable for their performance and outcomes?
 - Can you provide examples of how the City Manager has addressed performance issues within your department?
- **Vision and Strategic Planning:**
 - How well does the City Manager articulate and implement a vision for the organization's future?
 - Can you discuss how the City Manager involves department heads in strategic planning and decision-making processes?
- **Ethical Standards and Integrity:**
 - How does the City Manager demonstrate ethical behavior and integrity in their interactions with department heads, staff, and external stakeholders?
 - Can you provide examples where the City Manager has upheld ethical standards and promoted a culture of integrity within the organization?
- **Overall Impact and Effectiveness:**
 - From your perspective as a department head, how would you rate the overall performance of the City Manager in leading the organization?
 - What are the City Manager's strengths and areas for improvement, particularly as they relate to your department and its operations?