



**AGENDA**  
**CITY OF LAKE WORTH BEACH**  
**SPECIAL CITY COMMISSION MEETING –**  
**CITY MANAGER PERFORMANCE EVALUATION**  
**CITY HALL COMMISSION CHAMBER**  
**MONDAY, DECEMBER 11, 2023 - 5:00 PM**

**ROLL CALL:**

**PLEDGE OF ALLEGIANCE:** led by Commissioner Reinaldo Diaz

**NEW BUSINESS:**

A. [Performance Evaluation of City Manager Carmen Davis](#)

**ADJOURNMENT:**

The City Commission has adopted Rules of Decorum for Citizen Participation (See Resolution No. 13-2023). The Rules of Decorum are posted within the City Hall Chambers, City Hall Conference Room, posted online at: <https://lakeworthbeachfl.gov/government/virtual-meetings/>, and available through the City Clerk's office. Compliance with the Rules of Decorum is expected and appreciated.

If a person decides to appeal any decision made by the board, agency or commission with respect to any matter considered at such meeting or hearing, he or she will need a record of the proceedings, and that, for such purpose, he or she may need to ensure that a verbatim record of the proceedings is made, which record includes the testimony and evidence upon which the appeal is to be based. (F.S. 286.0105)

# STAFF REPORT REGULAR MEETING

**AGENDA DATE:** December 11, 2023

**DEPARTMENT:** City Commission

**TITLE:**

Performance Evaluation of City Manager Carmen Davis

**SUMMARY:**

Performance Evaluation for the City Manager in accordance with her Employment Agreement

**BACKGROUND AND JUSTIFICATION:**

In accordance with the Employment Agreement between Carmen Davis and the City, a Performance Evaluation must be conducted. The Evaluation Form and format for the evaluation were approved at the September 5, 2023 meeting. The process decided at that meeting was that each Commissioner was to meet one-on-one with City Manager Davis to discuss their evaluation. This would be followed by the formal public discussion and review of the completed evaluations.

**MOTION:**

N/A

**ATTACHMENT(S):**

Performance Evaluation Forms (to be provided before the meeting)

# CITY OF LAKE WORTH BEACH CITY MANAGER PERFORMANCE EVALUATION

**RATING:**

1. Unsatisfactory
2. Needs strengthening
3. Satisfactory Performance
4. Good Performance
5. Outstanding Performance

**COMPLETED BY:**

Carmen Y. Davis

<b>I. Organizational Management</b>	<b>RATING</b>				
	1	2	3	4	5
1. Provides that the organization complies with appropriate established board procedures.					X
2. Plans and organizes ongoing programs and services for the City Commission.				X	
3. Plans and organizes areas of concern brought to the attention of the City Manager by the City Commission or responses to public requests.				X	
4. Establishes a standard of excellence based on industry best practices for the organization.				X	
<b>COMMENTS/SUGGESTIONS:</b>					
<p>My leadership in organizational management is one of my areas of strength. Through the team and with my leadership, the established board procedures have been followed:</p> <ul style="list-style-type: none"> <li>• Through observation and feedback from the Commission, the board procedures have been revisited and revised to promote more productive and effective meetings.</li> <li>• Assisted the Commission to establish the City's priorities and have guided the team through matters to align with the Commission's direction and priorities.</li> <li>• Established weekly one-on-one meetings with the Commission to create positive communication, transparency, and ongoing feedback.</li> <li>• Improved responsiveness to email correspondences and requests from the Commission and the public on routine and pressing City matters.</li> <li>• Encouraged and supported the team in professional development and best practices in their respective professional/industry organizations</li> <li>• Recognized the influence and leveraged the knowledge and talent of the directors and assistant directors known as leaders among their peers in the area and/or the state.</li> </ul>					
TOTAL SCORE <u>18</u> ÷ 4 = <u>4.5</u>					
<b>II. Fiscal Management and Budgeting</b>	<b>RATING</b>				
	1	2	3	4	5
1. Plans and prepares the annual budget in accordance with the priorities established by the Mayor and the City Commission with documentation and full explanation of the annual budget.				X	
2. Administers the adopted budget within the framework of the approved revenues and expenditures.				X	

3. Plans and provides for a system of reports, as requested, for the City Commission to evaluate expenses and revenues.				X	
4. Prepares and presents to the City Commission appropriate budgetary transfers, as necessary.				X	
5. Ensures actions and decisions reflect an appropriate level of responsibility for financial planning and accountability.					X
6. Plans for, organizes and supervises the most economical utilizations of staff, materials and equipment for City services.				X	

**COMMENTS/SUGGESTIONS:**

As mentioned, strategic priorities have been established by the Commission accompanied with the needed funding. All agenda items with financial implications are reported on the staff reports. The Finance team will start including the budgetary impact along with the remaining funding account balance. The Finance team along with the department directors are budget aware and understand that it is critically important to be fiscally responsible in all matters and follow the GFOA standards. The new Finance leadership of Director Yannick Ngendahayo, together with Assistant Director Monica McNaughton, and Assistant Director Valentina Sustaita have begun establishing processes that foster structure, efficiency, accountability, and fiscal sustainability.

TOTAL SCORE 25 ÷ 6 = 4.2

<b>III. Intermediate and Long-Range Planning</b>	<b>RATING</b>				
	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
1. Carries out intermediate and long-range planning concerns approved by the City Commission.				X	
2. Plans and organizes maximum utilization and maintenance of City owned assets.				X	
3. Plans and organizes a program of addressing the current needs and requirements of infrastructure and infrastructure needs of the future.					X
4. Progress towards implementing the City Commission's vision of innovation, problem solving and solution-oriented action.				X	
5. Keeps the Mayor and City Commission aware of new or impending legislation, potential grants and developments in public policy, which may have an impact on the city.				X	
6. Maintains knowledge of new technologies, systems and methods that may enhance the City's operations.				X	



**COMMENTS/SUGGESTIONS:**

Planning on an intermediate and long-range level is reflected in the Capital Improvement Program every year and implemented, particularly concerning City owned assets and infrastructure. In collaboration with the team, we approach each issue or project with a “think outside of the box” mindset. Where appropriate, creative solutions are sought for matters brought to the team from the Commission as a body or individual members to bring the most effective solution for the community. For example, through the relationship with the National Forum of Black Public Administrators (NFBPA) organization, the City was granted an AmeriCorps Vista member to assist the City in enhancing community engagement, and quality of life issues. This opportunity afforded the City a staff position for one year (with the possibility of a year extension) at no cost to the City that address quality of life priorities of the Commission.

With the assistance of the lobbyist, the Commission is regularly updated on legislative activities and decisions. The team has obtained grant consultants with various technical expertise to seek funding opportunities that are within our capacity to execute.

New technologies have been implemented to enhance City operations to include migration to cloud storage, increased internet speed to accommodate future internet needs, new ERP system analysis, training on existing ERP system to enhance effectiveness and productivity, cybersecurity enhancements, disaster recovery improvement, ADP Payroll to eliminate manual redundancy, remote work capabilities, electronic record retention, meeting video link on website, electronic parking system. There are other opportunities to improve City operations through technology. The team is working on solutions for the on-line permit payments, enhanced website, and more.

TOTAL SCORE 25 ÷ 6 = 4.2

<b>IV. Intergovernmental Relationships</b>	<b>RATING</b>				
	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
1. Maintains awareness of developments and plans in other jurisdictions, which may impact the City.				X	
2. Maintains communication with governmental jurisdictions in area of service that improves or enhances City programs.				X	
3. Initiates communication with other governmental entities or outside parties, which the City may be involved with or become involved.				X	

**COMMENTS/SUGGESTIONS:**

I have developed relationships with Federal, State, and County officials, other municipalities, Florida City/County Manager's Association, Palm Beach County City/County Manager's Association, Palm Beach County League of Cities, National Forum of Black Public Administrators (National and South Florida Chapter), LWB neighborhood associations, community partners, and non-profit organizations. These relationships have resulted in information, resources, and support for the community. A few examples are:

- \$750k grant for affordable housing projects in partnership with the CRA, Congresswoman Frankel's Community Project Funding,
- NFBPA AmeriCorps Vista member grant,
- Town of Lantana airport expansion support, and
- Increased local support from PBC Community Services Division (rental assistance mobile unit).

TOTAL SCORE 12 ÷ 3 = 4.0

<b>V. Relationship with the Public</b>	<b>RATING</b>				
	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
1. Establishes and maintains an image of the City of Lake Worth Beach to the community that represents service, enthusiasm and professionalism.				X	
2. Ensures that an attitude and feeling of helpfulness, courtesy and sensitivity to perception exist in employees coming in contact with the public.				X	
3. Makes an effort to understand issues, concerns, and the values of the community.				X	
4. Meets with and listens to members of the community to discuss concerns and strives to understand their interests.				X	
5. Establishes and maintains a liaison with private organizations, service groups or individuals involved in areas of concern that relate to the service or activities of the City.				X	
6. Promotes and provides information to public inquiries regarding activities, services or potential employment development with the City.				X	
7. Assures that prompt and accurate information is provided to the public as appropriate.				X	

**COMMENTS/SUGGESTIONS:**

I regularly and proactively attend neighborhood association meetings to build relationships with the community – residents, businesses, and community partners, in addition to engaging with and volunteering in community activities and events in the community, schools, and county. I also was invited to several speaking engagements, 1) Office of Equal Business Opportunity “A Virtual Conversation With” series for Women’s History Month (women who manage the county and local municipalities) – March 2022, 2) Arms of Hope Supa Jamz Radio Show with Patrick Livingston and, 3) recently, serving as the liaison for the newly formed Business Advisory Board.

I recognize that the City should always focus on providing prompt information for better community engagement. Staff will continue to involve community partners and advisory board members for effective solutions. Also, the team and I are working to enhance the public website, utilize social media tools, and create informational brochures of common interest/transparency for the community.

TOTAL SCORE 28 ÷ 7 = 4.0

VI. Management of Employee Relationship	RATING				
	1	2	3	4	5
1. Plans, organizes and maintains training of employees through in-house training or outside training.				X	
2. Maintains regular staff meetings.					X
3. Maintains contact and professional interaction with subordinates at all levels of the organization.				X	
4. Encourages teamwork, innovation, and effective problem-solving among the staff members.					X
5. Maintains an organization that is efficient, helpful and courteous to the employees.			X		
6. Establishes and maintains high standards for hiring and retaining employees.				X	

**COMMENTS/SUGGESTIONS:**

With an open-door policy, I create an open and honest work environment and make my team feel safe to come to me with any their concerns and questions. As mentioned earlier, staff is expected to work collaboratively as a team capitalizing on critical thinking and problem solving. Employees are given the opportunity to attend professional development and organization training courses to enhance their area of knowledge. As City Manager, I hold weekly staff meetings with the department directors. The weekly meetings allow for the sharing of information, encouragement, and group problem solving. Also, I periodically visit the departments to connect with the staff and make myself available. Despite our limitations to keep up with the current salary levels of our neighboring communities, we are obtaining feedback from staff and exploring creative opportunities for recruiting and retaining employees.

Efforts will be made to seek the teams’ recommendations to address training topics, supervision and leadership, customer service, tools and resources, and inconsistent policies. An area we will continue to focus on is enhancing our level of customer service for internal and external interactions to improve our effectiveness. Customer Service training is scheduled in the month of October for all employees. A goal is to create a cross functional team to develop a customer service model.

TOTAL SCORE 26 ÷ 6 = 4.3

<b>VII. Relationship with City Commission</b>	<b>RATING</b>				
	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
1. Maintains effective communication, both verbal and written with the City Commission.				X	
2. Maintains availability to the City Commission.					X
3. Provides information needed for City Commission action in a timely manner and is prepared to answer questions of the City Commission.				X	
4. Provides regular updates to the Commission, keeping them informed about current and critical issues.				X	
5. Provides for clear presentations to the City Commission in the most concise, clear and comprehensive manner possible.				X	
6. Provides the City Commission with various perspectives of an issue and provides a recommendation and reason to support that recommendation.				X	
7. Implements City Commission actions in accordance with the intent of the Commission and supports the actions after a decision has been reached, both inside and outside the organization.				X	

**COMMENTS/SUGGESTIONS:**

One-on-one weekly meetings are held with each Commission member to discuss City issues, community concerns, updates, and upcoming agenda items. These meetings also allow me to understand each Commission members' areas of interest/concerns. I always make myself accessible and available to the Commission to answer questions or provide needed information. The Commission is provided the meeting agenda with staff reports and backup documents in digital medium or hardcopy about 2 weeks prior to the meeting.

When discussion issues and concerns, I provide the Commission with a full perspective on a matter in order to determine the most practical and effective approach or recommendation. At the end of the day, Commission decisions are implemented and supported as directed.

TOTAL SCORE 29 ÷ 7 = 4.1

<b>VIII. Professional Development</b>	<b>RATING</b>				
	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
1. Is the City Manager viewed with respect as compared to others in Public Administration?					X
2. Does the City Manager enthusiastically seek and support professional improvement through pertinent seminars and conferences?					X
3. Does the City Manager deal effectively with other governmental managers?					X
4. Is the City Manager always interested in learning new techniques or envisioning new ways to conduct business?					X

**COMMENTS/SUGGESTIONS:**

I have participated in a number of professional development activities to learn new techniques, ideas, and building relationships with other public administrators to exchange resources/information on issues impacting the City. I have attended:

1. NFBPA City/County Manager Symposium – Nov. 2022
2. FCCMA Onsite Training Session: Career Growth, Succession Planning, and Mental Health – Jan. 2023
3. Florida League of Cities and Palm Beach County Ethic Trainings – on going
4. Participated as a mentor in the NFBPA Mentoring Program – Jan. 2023 – May 2023
5. FLC/FCCMA Pre-Legislative Session Webinar – March 2023
6. FCCMA Podcast Episode #109: Recovering and Rebuilding: Insights from FDEM and FEMA – Aug. 2023
7. FCCMA Webinar - The Ten Commitments of Accountability: Developing Accountable Leaders – Aug. 2023
8. International City/County Manager’s Association Annual Conference –Sept./Oct. 2023
9. Various internal LWB training sessions

TOTAL SCORE 20 ÷ 4 = 5.0

**IX. Personal Characteristics**

**RATING**

	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
1. Imagination: Does the City Manager show originality in approaching problems? Is she able to visualize the implications of various approaches?				X	
2. Objectivity: Is the City Manager unemotional and unbiased? Does she take a rational viewpoint based on facts and qualified opinions?					X
3. Drive: Is the City Manager energetic, willing to spend whatever time is necessary to do a good job?					X
4. Decisiveness: Is the City Manager able to reach timely decisions and initiate action?				X	
5. Attitude: Is the City Manager enthusiastic, cooperative and willing to adapt?					X

**COMMENTS/SUGGESTIONS:**

I have been objective when dealing with complex and challenging issues minimizing emotion and bias. I pride myself in understanding all viewpoints and concern the needs prior to determining how a matter should be addressed. I have gone above and beyond to get the job done, as well as, demonstrated my ability to be adaptable, cooperative and enthusiastic even under pressure.

TOTAL SCORE 23 ÷ 5 = 4.6

Tabulation: Total of 9 categories (average) = 38.9 ÷ 9 = 4.3

## ACHIEVEMENTS

List the top three achievements or strong points of the City Manager for the past twelve (12) months.

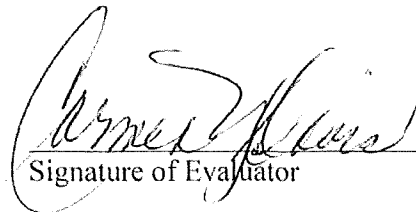
1. Approval of the restoration and development of the Gulfstream Hotel project
2. Assisting the Commission in the allocation of \$19m ARPA funds and addressing long awaited capital improvements projects
3. Guiding the Commission in developing a strategic development plan
4. Leading the first ever Redistricting process in the LWB's 100-year history

(A comprehensive list of departmental accomplishments for FY2022. The FY2023 departmental accomplishments will be available are expected to be available in about one week)

## FUTURE DEVELOPMENT

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

1. Completing the projects supported by the ARPA funds in order to meet the required spending deadline
2. Develop a customer service model
3. Develop and recruiting and retention plan

  
Signature of Evaluator

**Carmen Y. Davis, City Manager**  
**October 23, 2023**

**SELF-PERFORMANCE EVALUATION**  
**REFLECTIONS**

I would like to first express my appreciation for being selected to serve the City of Lake Worth Beach for the last 22 months (since December 6, 2021). My enthusiasm to accept this role and serve the Lake Worth Beach (LWB) community was the opportunity to work with the new City Commission in steering the city operations in a new direction. During the first 12 months, I spent time listening, learning, and understanding the City (City Commission, staff, community, and the issues) while jumping in headfirst, emerging directly into many challenging issues. Likewise, at the time of my hire, the country was recovering from the unprecedented COVID-19 pandemic, which impacted in person contact and delayed connections in the community.

Some of the challenging issues during my first year were: implementing COVID-19 preparedness and protocols while maintaining continuity of city services, addressing the municipal pool restoration, making a determination of an anonymous personnel matter leading to a third-party investigation, negotiating the development of the well-loved, historic Gulfstream Hotel, allocation of \$19 million of ARPA funds, establishing strategic priorities, stabilizing a Finance Department, negotiating a new PBSO contract for law enforcement services, dealing with the rising natural gas prices that resulted in increased electric utility rates, navigating through a housing crisis, addressing houselessness issues, managing the historic redistricting, reviewing a proposed tourism master plan, pursuing the redevelopment of the L&M development project, overseeing advisory board interview process, participating in bringing into fruition the Hub Recovery in the community, exploring the development of a Crisis Intervention Team Program and Human Services Programs proposal.

Given these competing challenges and based on my Self-Performance Evaluation, I have performed at the 4.3 rating/performance level. The comments in the performance evaluation and the additional information provided below support this belief.

**ACCOMPLISHMENTS**

*Year 1*

During the first year (December 2021-December 2022), the following achievements were accomplished:

- Guided staff through matters to align with Commission direction and priorities.
- Supported the team to achieve innovative accomplishments which resulted in effective services and operational efficiencies.

- Brought a professional and process driven standard to the City.
- Brought a collaborative and team approach by including cross functional team engagement (working to dissolve the silo approach).
- Initiated and began establishing a Strategic Priorities Plan.
- Approval of Historic Gulfstream Hotel (negotiation of the development incentives/LOI, initiated economic impact study, managed economic development agreement process with third party negotiator, approval of restoration development)
- Successfully lead Redistricting efforts (first in the City's hundred-year history)
- Guided the allocation of ARPA funds in line with strategic priorities.
- Negotiated a two-year contract renewal with PBSO for law enforcement services (creating a two-year rate hold - previously a yearly contract).
- Initiated a comprehensive building assessment of the historical City Hall Annex building.
- Led and provided content for 2022 State of the City Address (Oct. 2022).
- Revised Travel Policy in adherence to OIG audit compliance requirement and currently updating for a more streamline and efficient administration.
- Hired Executive Assistant for the City Manager's Office.
- In partnership with CRA, secured a \$750,000 federal grant for affordable housing which leveraged \$2.5 million ARPA funds.
- Improved IT disaster recovery systems.
- Developed relationships with County officials, municipal organizations (PCCMA, FCCMA, PBC LOC, NFBPA (National and South Florida Chapters), local colleges and universities, Neighborhood Associations, and Community and Non-profit agencies.
- Assisted in the development of the DREAM Team (Crisis Intervention Team).
- Implemented COVID-19 Protocols and Operation Preparedness.



## Year 2

During the second year (January 2023 to present), after observing the City's needs and functions, I was able to determine areas that needed immediate attention. Therefore, several actions were/are being taken:

- Established new leadership for the Finance Department leading to the stabilization of the department and the proficiency of financial activities.
- Addressed and improved the Personnel Action Request process by creating financial accountability and cross functional controls to ensure requests are within the approved budget.
- Currently assessing the operations of the Electric Utilities Department.
- Hired new Water Utility Director and Assistant Director.
- Recipient of an AmeriCorps Vista Member volunteer granted from National Forum of Black Public Administrators (NFBPA) from the AmeriCorps Vista Program (assist with community engagement, enhance community partnership relations, and increasing critical resources and services).
- Secured a \$23.4 million grant from U. S. Department of Energy to support the continuation of the Electric Utility SHRIP project.
- Increased training and development opportunities for employees reduced the wait time for our utility customer.

## **POSITIVE QUALITIES**

I am a visionary/servant leader who is passionate about serving the LWB community and believes in its future. I take great pride in my work. My professional recommendations and thoughts are given in a respectful, fair, and transparent manner. With a naturally positive attitude, an open-door policy, and truly committed to employee professional development fostering a safe working environment of trust and operational competencies for the team.

I enjoy my role as a problem solver and look for innovative ways to address concerns, when necessary, and I always try to find the best outcome for the whole of the team, Commission, and the community. Because of my strong work ethic, I take my responsibilities seriously, devoting my working hours to going above and beyond what's required. Given the multitude of critical issues, my passion for this job motivates me to complete tasks as quickly as possible with the greater good in mind and to the best of my ability.

## **AREAS FOR IMPROVEMENTS and FOCUS**

There is always room for improvement in my work approach, and this is what I've discovered thus far:

- Delegating was initially difficult as I felt the need to engage in as many issues as possible to understand and be familiar with to ensure that the resolutions and approaches to those issues are aligned with the Commission's direction. The vacancy of the Assistant City Manager position has further extended the need to be hands-on.
- Balancing competing priorities and issues to achieve the optimal results for LWB, including timely communication with the Commission and staff.
- Prioritize customer service enhancements and training.

The following actions would address the areas for improvement and focus:

- Hiring a new Assistant City Manager to complete the City Administration Team for the City Manager's Office (joining the Executive Assistant and AmeriCorps Vista Member). Completing the staffing of the City Manager's Office provides for delegation of duties and timely communications.
- Building a strong customer service model beginning with conducting city-wide customer service training and policies.
- Finalization of a new LWB website.
- Implementing on-line payments for permits.
- Executing the Strategic Priorities Plan.
- Spending of the ARPA funds by ensuring projects are completed.
- Developing recruiting and retaining workforce solutions.
- Bringing more supportive resources provided by community partners for the community.
- Continuing to review and monitor financial controls to ensure accountability and compliance, as well as make sure that decisions and transactions are within the approved budget..

## PROFESSIONAL DEVELOPMENT AND TRAINING GOALS

Professional growth is very important to me, as an experienced local government manager, to better serve the community. I will continue to participate in training and educational opportunities. Below are a few upcoming professional development events that I plan to attend.

- Attend the PBC League of Cities Ethics Training, October 31, 2023.
- Attend the FCCMA 2023 Fall Symposium: From Principles to Practice: Ethical Decision-Making in Public Service, November 2, 2023 (Virtual Event).
- Attend the ICMA, NFBPA, FLC, PBC League of Cities, PBC City/County Manager's meetings and other professional development/training opportunities.

Thank you for this opportunity to reflect on the accomplishments and challenges, while looking towards the future needs of the City. I look forward to our discussion and receiving your feedback.

*Carmen Y. Davis*  
10/23/2023

12/4/2023  
**CORRECTION**  
FY2022-23 to  
FY2021-22

**City of Lake Worth Beach**  
**Accomplishments**  
**FY2021-2022**

**CITY ATTORNEY'S OFFICE**

The City is represented by Torcivia, Donlon, Goddeau and Rubin, P.A. as City Attorney.

*Accomplishments:*

- Negotiated an agreement with Carmen Y. Davis, the new City Manager;
- Recovered \$69,027.63 for the City from surplus funds from tax deed sales;
- Litigated to dismissal of the City from a lawsuit by the Gulfstream Condominium Association;
- Litigated to dismissal of the City from two lawsuits by Undasch Real Estate USA Ltd. Corporation;
- Assisted in the land use/rezoning process for the Gulfstream Hotel;
- Drafted Ordinances providing protection for residential and commercial tenants of Lake Worth Beach; and
- Negotiated the resolution of four (4) chronic nuisance cases.

**OFFICE OF THE CITY CLERK**

The Office of the City Clerk functions as the official custodian of records and the seal of the city, and administrator of the City's records management and records disposition program. The City Clerk is responsible for attending all City Commission meetings and related record keeping, overseeing all municipal elections, oversight of the City's cemetery, maintaining the city's Code of Ordinances, and maintaining, administering oaths and affirmation.

*Accomplishments:*

Over the course of the past twelve months, the Office of the City Clerk realized the following accomplishments:

- Had continuity of services seamlessly with the transition to a new City Clerk and the hiring of a new Deputy City Clerk;
- Adjusted to new operating procedures in a post-COVID work environment;
- Served as the Municipal Supervisor of Elections to run two successful municipal elections;
- Oversaw more than fifty (50) City Commissioner meetings that were held via Zoom and in person;

- Set up all Commission meetings for live streaming;
- Handled the paperwork for the sixty (60) burials in the two (2) City Cemeteries;
- Sent out and compiled information for 2,170 lien requests;
- Monitored and circulated 475 public records requests for the City;
- Began the process of converting all paper files into electronic copies to reduce carbon footprint;
- Currently in the process of reviewing a new electronic program for the retention of department files and election filing documents

## **DEPARTMENT OF COMMUNITY SUSTAINABILITY**

The Department of Community Sustainability is comprised of the following divisions:

- Building
- Business License
- Code Compliance
- Historic Preservation
- Planning and Zoning
- Strategic Planning and Design

### **Accomplishments:**

- The City has adopted a variety of innovative and significant incentives to encourage private investment and to facilitate a robust, sustainable City. Density, intensity, height, financial and transfer of development rights are all incentives that the City has embraced to foster a healthy climate for investment and sustained economic growth.
- Building Permit processed applications which have increased nearly 20% over the last year.
- Building Division has been forwarding out information via the City website regarding new FEMA flood regulations that will go into effect later this year.
- Building Division obtained approval for an Assistant Building Official and an offer has been made to hire someone (decision pending) candidate backed out due to cost to relocate from Texas. Position is currently being re-advertised.
- Planning, Zoning and Historic Preservation processed applications which have increased nearly 20% over last year.
- Completed the Gulfstream Hotel Project Entitlement Application:

In April the project received its first approvals from the City's Historic Resources Preservation Board with further recommendations to the City Commission for consideration. Open public hearings before the City Commission took place in June and July. The application was received at the end of January and was processed. It was heard by the City Commission on June 7 and again on June 21 and was approved.

- Staff coordinated a formal economic impact analysis for the Gulfstream Hotel Project.

- Staff drafted a Lake Worth Beach Affordable Housing Program, a Micro Unit Housing Program, and a Sustainable Building Qualitative Standards ordinance. All scheduled for adoption before initial advisory boards in June and then the Commission in September and October.
- Staff coordinated the Downtown Visioning charette held with Treasure Coast Regional Planning Council as facilitator, which will be presented to the Commission in October.
- Code Compliance has continued with compassionate code compliance due to COVID issues.
- Arbor Square Shopping Plaza was renovated.
- New Commercial Projects Opened:
  - a. Herff Jones – Dixie Highway
  - b. Palm Beach Auctions – Dixie Highway
- Approved residential projects or pending residential projects for much needed housing. They are as follows:
 

a. Deco Green	125 units with commercial space on the ground level (approved)
b. Advantis	200 units (approved)
c. The Bexley	200 units (approved)
d. Casa Bella	18 units (approved)
e. Lake Worth Apartments	24 units (approved)
f. Detroit Street Apartments	86 units (pending)
g. Residences of Lake Worth Beach	195 units (pending)
h. Lake Worth Station	88 units (pending)
i. The Perch	25 units (pending)
- The department oversaw the completion of the Bohemian Apartment Complex of 200 residential units as well as commercial space on the ground level with the City’s first parking garage that will provide 120 public spaces. The project also includes 60 affordable units through the County’s Affordable Housing Exchange Program.
- The staff is processing the submission of a 100,000 sq. ft. self-storage storage facility at Boutwell Road and Lake Worth Road, which will go before the Planning and Zoning Board in October.
- Completed damage assessment training for staff and NIMS training requirements for all staff.
- Code Compliance Staff completed a successful team building program conducted by Florida Atlantic University.

**ELECTRIC UTILITY DEPARTMENT**

The Lake Worth Beach Electric Utilities service area encompasses approximately 12 square miles, with nearly equal areas inside and outside the City limits. Approximately 75% of customers are within the City limits, with the remainder in the Village of Palm Springs municipal area (in which the City has a non-exclusive franchise to provide service through 2033) and portions of the Palm Beach County unincorporated area. The only neighboring utility is Florida

Power & Light Company ("FPL"), an investor-owned utility, and the City and FPL have entered into a Territorial Agreement and Contract for Interchange Service, dated as of March 6, 1972, which sets forth their respective service areas.

Accomplishments:

- The City is committed to a path to significantly lowering its carbon footprint through the use of high efficiency electric generation resources and renewable resources. Better than thirty-six percent (36%) of the electricity generated to meet our customers' needs comes from carbon-free resources such as nuclear and the City's solar plant. It is projected that by 2026 when the City's share of the FMPA Solar Projects comes on line. That solar energy will comprise upwards of 20% of our energy supply portfolio. This represents an approximate fifty percent (50%) reduction in our carbon emission rates compared to 2005 levels.
- The City's electric utility has identified five interrelated elements that shape the future of the electric utility – Energy Resources, Finance, Reliability, Customer Service and People. These five elements must remain in balance to achieve a sustainable successful outcome for the community the electric utility serves. If any of these elements were to falter, there will be an immediate impact on the others and the utility's customers.
- The City has increased energy conservation resulting in a reduction of energy use per customer and in peak demands. Increased energy conservation has resulted in an ongoing reduction in carbon emissions and a decrease in exposure to global events and the vagaries of natural gas and oil prices.
- The City's electric utility anticipates that by 2026, approximately 20% of its energy supply will come from carbon-free resources. Furthermore, the City electric utility anticipates that the efforts to maximize the use of carbon-free resources will allow it to reduce its carbon emissions by more than 50% compared to 2005 levels.
- The City's electric utility has made great progress over the past five years in reducing achieving the status of one of the lowest cost electric utilities in the state of Florida for residential customers. This has been achieved while obtaining approval and funding for approximately \$100 million in capital improvement projects aimed at system hardening and reliability improvement (SHRIP). Significant system-wide improvements in reliability are already being experienced by all of our customers.
- The City's electric utility has engaged the Solar Energy Loan Fund (SELF) to assist customers with obtaining government rebates, grants, or locally-sourced loans to help with energy conservation projects in their homes and businesses. The City's electric utility conservation team has been providing free energy audits, both on-line or in person for a number of years. Energy audit appointments are available six days per week and will be expanded to seven days per week shortly.

## **Finance Department**

The Finance Department has overall responsibility for the financial operations of the City. These operations include its: systems of financial policies, internal controls, accounting, financial reporting, procurement, grants management, and budgeting.

### **Accomplishments:**

Because of the Administration's support given to the Finance Department, the department has been able to focus efforts to improve back-office and operational efficiencies. For example, during the year the department has been able to accomplish the following.

- The staff began the budget process much sooner than usual resulting in the City being months ahead in its budget deliberations therefore providing more time to evaluate and make recommendations on the City's budget which drives overall City policy decisions.
- The City completed its annual audit in May which is significantly ahead of prior years, thereby allowing the Administration to have prior year audited financial statements as part of budget review. This single accomplishment is a bellwether of the improvements made throughout the year.
- The Finance Department recommended improved Fund Balance/Working Capital Financial Policies which were subsequently adopted by this Commission. These policies are intended to improve the City's overall financial position as they provide guidance relative to how much money the City needs in reserves based on recommended industry best-practices.
- In response to the County's Inspector General's travel audit, The Finance Department recommended a comprehensive Travel Policy which was subsequently adopted by this Commission. This policy addresses deficiencies identified in the audit and is intended to improve the City's internal control environment.
- Implemented new accounting procedures that improved operational processes in Accounts Receivable, Accounts Payable, and Cash management thereby improving general ledger postings and facilitated improved month-end and year-end closing cycles.
- As part of the improving the City's operational processes, the Finance Department has also focused on automated solutions. Among the recent implementations are: Automated Data Processing (ADP) for payroll processing and transitioning the City's banking services from Bank of America to JPM Chase is currently in process.
  - By using ADP for payroll processing, the City has improved payroll processing efficiencies by eliminating multiple, and often duplicated, manual steps, which have also reduced processing errors thereby reducing associated payroll costs.
  - By transitioning to JPM Chase, the City anticipates realizing multiple cost reductions and improved/expanded services which should directly improve customer services throughout the organization.



- In a combined effort between the Finance Department and the City’s Electric and Water utilities, the department oversaw the issuance of the \$43,765,000 in utility revenue bonds to enhance, strengthen, and make more resilient the City’s utility infrastructure.
- The Procurement Division updated the Purchasing Code to expand the local and small business preferences and to include qualifying veteran-owned business enterprise preference. The preference was also updated to include all City’s solicitations and is as follows:
  - Invitation for Bids - 5% or \$15,000, (whichever is less) to the lowest responsive and responsible bidder to a qualifying Local business, Small Business and/or Veteran Business Enterprise
  - Request for Qualifications, Requests for Proposals, or any other solicitation that utilizes evaluation process by using the point scale; 5% or 5 out of 100 points of the evaluation criteria is awarded to the business that claims small, local and/or veteran business enterprise preference.
- Procurement continues to improve the City’s contract management policies and procedures. These changes focus on improving the City’s internal controls while also mitigating risks.

## **HUMAN RESOURCES DEPARTMENT**

The Human Resources Department is responsible for all employee-related matters for the City, including hiring and termination, provision of insurance and benefits, training, etc. Lake Worth Beach is a Drug-Free Workplace and an Equal Employment Opportunity Employer (EEOE) and is committed to equal opportunity in the areas of recruitment, employment, training, development, transfer and promotion. Lake Worth Beach’s employment practices are without regard to race, color, creed, religion, gender identity or expression, sexual orientation, national origin, ancestry, disability, medical condition, age, marital status, familial status, veteran’s status, or any other characteristic protected under federal, state, or local law in all personnel and employment actions and in all terms and conditions of employment.

The Bell Seal for Workplace Mental Health is a distinction awarded by Mental Health America (MHA) to companies that meet mentally healthy workplace standards. Lake Worth Beach’s status as a Gold Bell Seal-certified organization demonstrates Lake Worth Beach’s outstanding commitment to employee mental health and well-being.

### **Accomplishments:**

- Increased our Recruitment efforts by adding the CDL (Commercial Driver’s License) MOU and implemented a program to incentivize current and future applicants in the Refuse Department to obtain CDL licenses;

- Managed the ADP Payroll and Timeclock Conversion process in transitioning from paper timesheets and internal, manual processes on Excel and Naviline to physical timeclocks and ADP software;
- Negotiated the conversion of a 5/5/5 cash balance plan for all new non-executive hires;
- Incorporated LGBTQ training for all employees in partnership with The Compass Group;
- Negotiated a 0% health insurance increase for the second consecutive year;
- The Safety Committee has been revived and came off to a good start;
- On-line Employee Evaluations will be released shortly;
- Successfully bargained with all three unions (PEU, PMSA & IBEW), with all three unions agreeing to three-year contracts through 2024;
- Successful completion of the Citywide CRASE/Active Shooter training;
- Successful completion of the Reasonable Suspicion Training that is a DOT (Department of Transportation) requirement for all Managers and Supervisors, who supervise employees with CDL licenses;
- Successful completion of the Citywide Ethics Training that is conducted tri-annually;
- Completed the Harassment and Diversity on-line training for all employees. This is completed annually. Next training is 11/1/22;
- Completed departmental Team Building Training in Code Enforcement and Leisure Services

## **INFORMATION TECHNOLOGY DEPARTMENT**

The Information Technology (IT) Department's primary mission is to enable City initiatives through excellence in technology. IT enables secure resilient capabilities to achieve interoperability, information sharing, and trusted collaboration for the City and its residents.

### **Accomplishments:**

The following accomplishments were realized:

- Completed multiple projects related to the City's IT network infrastructure, cybersecurity improvement, remote workforce and telephonic system, in addition to all IT daily activities and responsibilities. These include the following:
  - Network infrastructure hardware replacement, next generation
  - Email migration to the cloud
  - IT user forms workflow enhancement
  - Employee self-service password management solution deployed
  - Disaster recovery improvement
  - Building secondary data center for high availability purposes
  - Cisco IP telephony system call back feature implementation
  - Interactive voice response (IVR) system implementation for the City's main information line
  - IT network infrastructure installation in new building
  - Additional infrastructure as a service (IAAS) provided to internal department
  - Video-intercom system implementation in various city buildings

- Continued helpdesk support
- ESRI Field Apps application conversion – mobile user migration from ArcGIS Collector to ArcGIS field
- Fire Hydrant Data Collaboration with PBC – Data sharing and integration project for LWB Water Utility
- Several network management and monitoring cybersecurity threats.as follows:
  - Cybersecurity technology upgrade and new software implementation
  - Security access control system enhancements
  - Security surveillance upgrade
  - Security information and event management implementation
  - Cybersecurity: Social Engineering Phishing Campaign, Security Awareness Training Program city wide & Network penetration test by external contractor
- The City’s Geographic Information System (GIS) Division implemented a GIS enterprise user portal and a maps mobile mapping application citywide. GIS staff collaborated with Palm Beach County & Municipal Partners in the damage assessment, as well as Public Safety and Fire Rescue.
  - GIS support for Milsoft Implementation

## **LEISURE SERVICES DEPARTMENT**

The Leisure Services Department is committed to enhancing the lives of the City’s residents and visitors by providing safe, healthy, cultural and educational recreational opportunities for the community, while preserving and enhancing natural resources and stimulating the economic vitality of the community.

The Leisure Services Department consists of the following Divisions:

- Lake Worth Beach Golf Club
- Lake Worth Beach Public Library
- Special Events/Casino Ballroom
- Beach Complex: Parking, Pier and Ocean Rescue
- Parks and Recreation
- Communications

### **Accomplishments:**

#### **Golf Club Division accomplished the following:**

- Transacted 47,116 rounds of golf
- Realized more than \$1.5 million in golf course revenue, an increase of \$272,000 over previous fiscal year
- Erased our \$138,000 deficit resulting in a positive fund balance

- Featured on “Golfing the World” production, a nationally televised show on Fox Sports Sun
- Procured new fleet of 70 lithium ion golf carts

**Public Library Division accomplished the following:**

- Posted over 150 Storytime At Home Videos
- Wrote 6 grants totaling more than \$125,000. Received \$88,048 in grant funds.
- Continued the expansion of e-resources and WIFI services
- Opened the Florida Room making the Library’s historical collection available to the public
- Initiated the Literacy City campaign to raise the LWB literacy rate
- Added a literacy component to city events, including Street Painting, Taco Festival, and Easter events, etc.
- Revitalized relationships with community partners to strengthen the Library’s involvement in the City such as Guatemala-Maya Center, Bridges, Adopt-a-Family, Farmworkers Council, Healthier Lake Worth
- Strengthened the Library’s presence on social media, frequently posting on the City’s website, Facebook, and Instagram.
  - Opened the Library meeting room for community groups and library in-house programs.

**Special Events/Casino Ballroom Division accomplished the following:**

- Won eight (8) awards at the Florida Festival and Event Association Conference.
- Won Couples Choice Award 2022 for the Casino.
- Successfully executed the below events:
  - 2022 Street Painting Festival with about 100,000 visitors attending
  - Eight (8) Bonfires post COVID
  - Little Scream (10/29/21)
  - 1<sup>ST</sup> Veterans Day Parade/Ceremony post COVID (11/6/21)
  - 1<sup>ST</sup> Holiday Parade post COVID (12/17/21)
  - 1<sup>st</sup> Tree Lighting post COVID (11/27/21)
  - 1<sup>st</sup> MLK Ceremony Post COVID (1/17/21)
  - 1<sup>st</sup> Family Date Night back in the ballroom post COVID (2/12/22)
  - 1<sup>st</sup> City sponsored event Midnight Sun Festival post COVID (3/4-6/22)
  - 1<sup>st</sup> St. Patrick’s Day Parade post COVID (3/17/22)
  - City sponsored event Pride Fest (3/26-27)
  - 1<sup>st</sup> Annual Taco Fiesta (4/9/22)
  - 1<sup>st</sup> Easter Egg Hunt post COVID (4/16/22)
- Received twelve (12) awards at the Florida Festival & Events Association (FFEA) Convention. The competition this year was high with over 500 applications representing

Florida's best and brightest event organizers. Awards were won in the following categories:

- 1st Place Diversity, Equity and Inclusion initiative- Taco Fiesta
  - 1st Place Radio Promotion- Lake Worth Beach Street Painting Festival
  - 1st Place Promotional Mailer- Street Painting Festival
  - 1st Place Billboard/ Signage- Little Scream
  - 2nd Place Photo Opp Area- Easter Egg Hunt
  - 2nd Place Social Media Advertising Campaign- Street Painting Festival
  - 2nd Place Promotional Poster- 4th of July
  - 2nd Place T Shirt- Taco Fiesta
  - 2nd Place Billboard/Signage- Dia De Los Muertos
  - 3rd Place Billboard/Signage- Easter Egg Hunt
  - 3rd Place Promotional Poster- Street Painting Festival
  - 3rd Place Billboard/Signage- Street Painting Festival
- 
- Casino Ballroom Reservation Breakdown yielding an increase from last year:
    - Ballroom Reservation – 60
    - Beach Weddings -15
    - Terrace Weddings – 5
    - Courtyard Ceremony - 1
    - Kitchen Reservations - 26

**Ocean Rescue Division accomplished the following:**

The Lake Worth Beach Complex Ocean Rescue Division is responsible for overseeing the safety of all of its visitors along its ¼ mile beachfront property; 7 days a week, 365 days a year. Every day the City's Lifeguards continue to put their lives on the line to ensure all beach patrons have a fun and safe experience while swimming and enjoying our property. Not only do our Lifeguards watch over swimmers to prevent drownings; they also administer numerous first aids, and take many preventative actions a day. The City's Lifeguards pride themselves on their skill and knowledge, training on a daily basis to stay prepared for any emergencies that may arise.

- Saw the return of all regularly hosted special events. These events include:
  - Jr Lifeguard program (34 kids)
  - Beach Bonfires (8 with no rain outs)
  - Annual Crossing for a Cure

- Annual Tropical Triathlon
- Annual Pier Clean-up which was a joint effort with the City of Lake Worth Beach and Loggerhead Marine Center
- Ocean Rescue staff participated the Annual Holiday Parade
- Beach attendance returned to normal, as well as the number of rescues and medical calls compared to previous years.
- This year alone Ocean Rescue staff have responded to two (2) emergencies where CPR had to be initiated resulting in life saving outcomes.
- Ocean Rescue has taken part in two (2) Career Days within the public-school system to promote ocean safety and awareness to the youth of the community.
- Staff levels have increased as well which has allowed staff to take time off and schedule vacations. At this time all annual Beach events and programs have been scheduled for 2022. Ocean Rescue anticipates the same excitement and participation from the public for these programs and events as years past.

<b>Beach Statistics</b>	<b>2021</b>	<b>2022 year to date</b>
Beach patron attendance	676,215	396,580
Rescues	195	41
Drownings	0	0
Minor medicals	455	290
Emergency/ 911 responses	84	37
Preventative actions	24,040	11,483
Lost and found missing persons	8	3
Hours closed for shark sighting	21	19
Hours closed for lightning	24	8.5
Gallons of trash removed by guards	7,570	4,590

**Parks and Recreation Division accomplished the following:**

- Back to School Bash, the largest collaborative effort with community organizations in Lake Worth Beach, 500 backpacks and numerous school supplies were distributed
- Grand opening of Royal Poinciana Neighborhood Park installation of new netting and a protective border to ensure the safety of participants
- Ribbon cutting of Howard Park improvements project that included the resurfacing of the futsal and basketball courts, installation of new fencing around the futsal court, installation of new basketball goals, renovation of the pavilion and restrooms, and the installation of a trail with exercise stations.
- Started the first adult basketball league
- Organized and held the initial signature Halloween Event – the Haunted Escape Room – which will be held annually
- Held the annual bicycle giveaway for which there were 250 registered participants for the 134 bicycles that were given away

- Awarded a FUSION mini-grant from PBSO to fund ongoing and new programs in the City's south end that included the Valentine's giveaway, Field Day, Movie Night at Howard Park, Nerf Games, Family Fun Night and ClubCre8
- Collaborated with other community organizations in Lake Worth Beach to participate in Palm Beach County's "Let's Move Initiative"
- Incorporated Fitness as a part of the City's recreation programs, including Senior Zumba, Yoga, Self-Defense and Step Challenges
- Incorporated a spring season for the Lake Worth Beach Jaguars Tackle Football program
- Added new water fountains/bottle filling stations to Bryant Park, Howard Park, Northwest Baseball Complex, the Beach, Sunset Park and Club Cre8

## **Public Works Department**

The City's Public Works Department continued to provide essential services to the community during the pandemic. Services such as garbage collection, recycling, maintenance of parks and green spaces, repair of streets and sidewalks, and sanitizing and cleaning of public buildings and facilities were necessarily performed by staff in person.

The Public Works Department is comprised of the Following Divisions:

- Administration
- Facilities
- Solid Waste and Recycling
- Grounds
- Fleet
- Streets

### **Accomplishments:**

Public Works Administration provided coordination, oversight and general management of the various Divisions during this period with the goal of providing exceptional customer service to the City's residents and business owners. The following accomplishments were realized:

- The Department's masterplans were updated and efficiencies were improved throughout the Department
- More than 5,000 customer calls were handled
- Division staff performed 45 training hours

The Facilities Division accomplished the following:

- successfully maintained the City's public facilities and buildings during the ongoing pandemic in a safe and sanitized condition
- successfully incorporated additional measures from the City's ADA Transition Plan

The Solid Waste and Recycling Division realized the following accomplishments:

- performed automated garbage pick-up twice weekly, recycling once a week, yard waste collection once and week, and bulk waste collection once a month
  - more than 40,358 tons of garbage and bulk trash were collected
  - more than 2,36 tons of recycled material were collected
  - more than 3,800 notices of violation with collection compliance were issued
- increased the focus on commercial recycling for the businesses in the City.
- cardboard recycling centers have been established
- a new compactor has been installed for the Beach property
- relaxed restrictions for the pandemic allowed for re-engagement and outreach in the community, including efforts with local schools and neighborhood associations.

The Grounds Division accomplished the following:

- procurement of a Tree and Landscape specification Manual through the City’s Tree Board
- received funding through the Tree canopy Restoration Fund to assist in the Division’s effort to continually increase the City’s tree canopy every year
- the Cemeteries Section realized important updates to ordinances and regulations to facilitate the uses of these properties
- maintained City parks and public spaces
  - more than 100 cubic yards of litter and garbage were collected

The Fleet Division accomplished the following:

- continued its effort to develop a more proactive and efficient fleet maintenance operation focused on the reduction of vehicle and equipment downtime
  - the time to make necessary repairs to vehicles and equipment was significantly reduced which allowed the City to maintain a 90% ready status
- eleven alternative fuel vehicles were added to the City’s fleet
- more than 72,000 gallons of unleaded fuel were consumed

The Streets Division realized the following accomplishments:

- purchase of a second street sweeper, thereby allowing the termination of a sweeping contract with an outside vendor and having this operation back in house
- placing a primary focus has been the systematic implementation of deferred roadway and sidewalk maintenance
  - more than 300 tons of hot mix asphalt were placed
  - more than 400 cubic yards of concrete were placed

## **Water Utilities Department**

The City’s Water Utilities Department provides potable drinking water, collection of wastewater and stormwater throughout the City and service areas. The Water Utilities Department is comprised of three Divisions as follows:



- Water Division
- Stormwater Division
- Sewer Collection and Transmission

Accomplishments:

- In the process of completing final phase of 16-mile 2” galvanized steel water main replacement and fire hydrants
- In the process of completing the final phase of underground infrastructure in conjunction with Neighborhood Road program
- Rehabilitated water booster stations and storage tanks
- Beginning replacement of outdated water supply wells
- Successfully obtained grants for South Palm Park and Eden Place stormwater resiliency

# CITY OF LAKE WORTH BEACH CITY MANAGER PERFORMANCE EVALUATION

**RATING:**

1. Unsatisfactory
2. Needs strengthening
3. Satisfactory Performance
4. Good Performance
5. Outstanding Performance

COMPLETED BY: MAYOR

<b>I. Organizational Management</b>	<b>RATING</b>				
	1	2	3	4	5
1. Provides that the organization complies with appropriate established board procedures.				✓	
2. Plans and organizes ongoing programs and services for the City Commission.				✓	
3. Plans and organizes areas of concern brought to the attention of the City Manager by the City Commission or responses to public requests.			✓	<del>✓</del>	
4. Establishes a standard of excellence based on industry best practices for the organization.				✓	
<b>COMMENTS/SUGGESTIONS:</b>					
TOTAL SCORE <u>15</u> ÷ 4 = <u>3.7</u>					
<b>II. Fiscal Management and Budgeting</b>	<b>RATING</b>				
	1	2	3	4	5
1. Plans and prepares the annual budget in accordance with the priorities established by the Mayor and the City Commission with documentation and full explanation of the annual budget.				✓	
2. Administers the adopted budget within the framework of the approved revenues and expenditures.				✓	
3. Plans and provides for a system of reports, as requested, for the City Commission to evaluate expenses and revenues.			✓		
4. Prepares and presents to the City Commission appropriate budgetary transfers, as necessary.				✓	
5. Ensures actions and decisions reflect an appropriate level of responsibility for financial planning and accountability.				✓	
6. Plans for, organizes and supervises the most economical utilizations of staff, materials and equipment for City services.				✓	

**COMMENTS/SUGGESTIONS:**TOTAL SCORE  $23 \div 6 = 3.8$ **III. Intermediate and Long-Range Planning****RATING**

	1	2	3	4	5
1. Carries out intermediate and long-range planning concerns approved by the City Commission.				✓	
2. Plans and organizes maximum utilization and maintenance of City owned assets.				✓	
3. Plans and organizes a program of addressing the current needs and requirements of infrastructure and infrastructure needs of the future.				✓	
4. Progress towards implementing the City Commission's vision of innovation, problem solving and solution-oriented action.				✓	
5. Keeps the Mayor and City Commission aware of new or impending legislation, potential grants and developments in public policy, which may have an impact on the city.				✓	
6. Maintains knowledge of new technologies, systems and methods that may enhance the City's operations.				✓	

**COMMENTS/SUGGESTIONS:**TOTAL SCORE  $24 \div 6 = 4$ **IV. Intergovernmental Relationships****RATING**

	1	2	3	4	5
1. Maintains awareness of developments and plans in other jurisdictions, which may impact the City.					✓
2. Maintains communication with governmental jurisdictions in area of service that improves or enhances City programs.					✓
3. Initiates communication with other governmental entities or outside parties, which the City may be involved with or become involved.					✓

**COMMENTS/SUGGESTIONS:**TOTAL SCORE  $15 \div 3 = 5$

<b>V. Relationship with the Public</b>	<b>RATING</b>				
	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
1. Establishes and maintains an image of the City of Lake Worth Beach to the community that represents service, enthusiasm and professionalism.					✓
2. Ensures that an attitude and feeling of helpfulness, courtesy and sensitivity to perception exist in employees coming in contact with the public.		✓			
3. Makes an effort to understand issues, concerns, and the values of the community.				✓	
4. Meets with and listens to members of the community to discuss concerns and strives to understand their interests.				✓	
5. Establishes and maintains a liaison with private organizations, service groups or individuals involved in areas of concern that relate to the service or activities of the City.				✓	
6. Promotes and provides information to public inquiries regarding activities, services or potential employment development with the City.			✓		
7. Assures that prompt and accurate information is provided to the public as appropriate.				✓	
<b>COMMENTS/SUGGESTIONS:</b>					
TOTAL SCORE $26 \div 7 = 3.7$					
<b>VI. Management of Employee Relationship</b>	<b>RATING</b>				
	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
1. Plans, organizes and maintains training of employees through in-house training or outside training.				✓	
2. Maintains regular staff meetings.					✓
3. Maintains contact and professional interaction with subordinates at all levels of the organization.					✓
4. Encourages teamwork, innovation, and effective problem-solving among the staff members.					✓
5. Maintains an organization that is efficient, helpful and courteous to the employees.					✓
6. Establishes and maintains high standards for hiring and retaining employees.					✓

**COMMENTS/SUGGESTIONS:**TOTAL SCORE  $29 \div 6 = 4.83$ **VII. Relationship with City Commission****RATING**

1 2 3 4 5

1. Maintains effective communication, both verbal and written with the City Commission.

✓

2. Maintains availability to the City Commission.

✓

3. Provides information needed for City Commission action in a timely manner and is prepared to answer questions of the City Commission.

✓

4. Provides regular updates to the Council, keeping them informed about current and critical issues.

✓

5. Provides for clear presentations to the City Commission in the most concise, clear and comprehensive manner possible.

✓

6. Provides the City Commission with various perspectives of an issue and provides a recommendation and reason to support that recommendation.

✓

7. Implements City Commission actions in accordance with the intent of the Commission and supports the actions after a decision has been reached, both inside and outside the organization.

✓

**COMMENTS/SUGGESTIONS:**TOTAL SCORE  $29 \div 7 = 4.14$ **VIII. Professional Development****RATING**

1 2 3 4 5

1. Is the City Manager viewed with respect as compared to others in Public Administration?

✓

2. Does the City Manager enthusiastically seek and support professional improvement through pertinent seminars and conferences?

✓

3. Does the City Manager deal effectively with other governmental managers?

✓

4. Is the City Manager always interested in learning new techniques or envisioning new ways to conduct business?

✓

**COMMENTS/SUGGESTIONS:**TOTAL SCORE  $20 \div 4 = 5$ **RATING**

## IX. Personal Characteristics

	1	2	3	4	5
1. Imagination: Does the City Manager show originality in approaching problems? Is she able to visualize the implications of various approaches?					✓
2. Objectivity: Is the City Manager unemotional and unbiased? Does she take a rational viewpoint based on facts and qualified opinions?					✓
3. Drive: Is the City Manager energetic, willing to spend whatever time is necessary to do a good job?					✓
4. Decisiveness: Is the City Manager able to reach timely decisions and initiate action?					✓
5. Attitude: Is the City Manager enthusiastic, cooperative and willing to adapt?					✓
<b>COMMENTS/SUGGESTIONS:</b>					
TOTAL SCORE $25 \div 5 = 5$					

Tabulation: Total of 9 categories (average) =  $\frac{206}{9} = 22.88$   
 Average

**ACHIEVEMENTS**

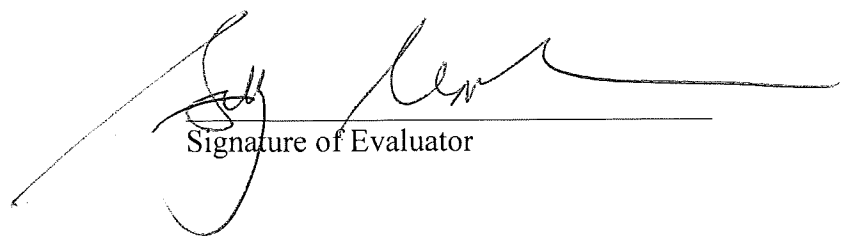
List the top three achievements or strong points of the City Manager for the past twelve (12) months.

Please see  
attached notes

**FUTURE DEVELOPMENT**

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

Please see attached notes

  
Signature of Evaluator

Mayor Resch comments:

- I. ORGANIZATIONAL MANAGEMENT: Ms. Davis came to the position in the middle of a big change in the whole commission and management of the city. It is a formidable job to begin the process of assessing the status of the city, the staff, conditions which are currently "on top of the pile", establishing relationships with her staff, other agencies, the public and not least of all, the commission. Dealing with five different personalities is a challenge in the best of circumstances.
  
- I. FISCAL MANAGEMENT AND BUDGETING: Under Ms. Davis supervision, the budget process has become much more transparent and user friendly. The budget is done on time, with plenty of opportunities for the commission to meet with her and the Finance Director to ask any questions and get what clarifications may be needed. The proposed budgets are given to the commission in plenty of time to review and assess and ask questions for clarification, etc.  
  
If reports are requested on any specific financial item, I find that She responds to my question, and if she isn't aware of the answer at that moment, she finds out the status.
  
- II. INTERMEDIATE AND LONG RANGE PLANNING: Lake Worth Beach has many moving parts; Lots of balls in the air at all times. Ms. Davis has to rely on her senior staff to ensure that things are moving smoothly. She is a skillful problem solver; she is able to assess a situation and work with staff to find a solution which is workable.
  
- III. INTERGOVERNMENTAL RELATIONSHIPS: This is an area in which Ms. Davis excels. Within a short time of coming to the city, she began to develop great working relationships with folks from other cities. She regularly attends the Palm Beach County League of Cities casual monthly lunches for our district, as well as the monthly larger Palm Beach County League lunch and learn meetings all over the county. This is an excellent way for her to meet with and get to know other city managers and elected officials. This has benefitted the city in that she can pick up the phone and speak with people who can help. Especially important is the relationship she has established with Verdenia Baker, the Palm Beach County Administrator. Often the city and the county have interactions, and their relationship is a very helpful one.
  
- IV. RELATIONSHIP WITH THE PUBLIC: Ms. Davis presents a very professional and enthusiastic persona to the public. She is impeccable in her appearance, and has an open and friendly attitude when dealing with people. I know that she regularly meets with members of the public who request her time. She meets with and has established relationships with local groups. Ms. Davis has attended many public events, neighborhood picnics, ribbon cuttings, etc.



- V. **MANAGEMENT OF EMPLOYEE RELATIONSHIPS:** After being here a while, Ms. Davis realized that for some time, there was a very loose practice of hiring without any approval from the city manager. This led to a situation where folks were hired, but there was no communication between departments as to funding those positions. Ms. Davis has instituted a protocol wherein she has her eyes on every hire, and assures that finance knows about it, determines that there is funding for the position, and sets up that funding. This old practice led at one point to a shortfall in funding some positions that had been filled without the finance department knowing about it. Systems and those kinds of protocols keep the organization on a steady course.

There was one situation which Ms. Davis showed extraordinary leadership. The finance department was having some difficulties in personnel and process. Ms. Davis recognized the problem and handled it in a most professional and even-handed way. She undertook a thorough investigation of the problem, interviewed staff, reviewed past budget reports and state audits which had been submitted late on more than one occasion, and determined that the best course of action was a change in leadership of that department. She successfully recruited our current finance director to return to the city (he had left to work for another municipality) as finance director. Since that change, the audits are on time, the employees are more content in their work, and the department is running smoothly.

From my perspective, the budget reports, proposed budgets have become much more user friendly, more understandable and easier to understand.

- VI. **RELATIONSHIP WITH CITY COMMISSION:** My experience with Ms. Davis and her communication with me has been very positive. She keeps me up to date either in person or by phone or email with any updates. She is very available to me. Of course I don't know how this works with the others.

When I bring an idea to her, she listens, and responds as best as she can. We come in with our ideas and she has to vet them as best she can as to whether they can work or not .

There have been one or two instances where she misstepped, but with no ill intent. As soon as she realized a problem, she was quick to resolve it. The Head Start was one, the letter she sent was a little harsh, however in fact she had not been contacted about the program wanting to extend the lease, which they knew was expiring. When she realized the problem, she reached out to them to work on a solution.

One really revealing event was when she was told by staff that expenditures which needed approval had been made without that approval. Each expenditure (or most of them) were under the limit required for approval, and she could very well have kept the problem quiet by resting on that fact. She did not, however, she immediately brought it to our attention. It became an agenda item which did get approval for the expenditures. Her honesty in this

situation was a very telling moment for me; she faced the problem head on, was open about it and did nothing to conceal the problem. Well done.

VII. PROFESSIONAL DEVELOPMENT; Ms. Davis is very active in her professional organizations and attends conferences to develop her skills. I have observed her interactions with others in the field and it is obvious that she is respected. Ms. Davis is a wonderful "face" of the city.

VIII. PERSONAL CHARACTERISTICS; I have given 5's in this category. Lake Worth Beach is not an easy city to manage. I'm sure she feels at time like she is herding cats! She is consistently professional and calm (even in the face of being disrespected in public and behind closed doors.)

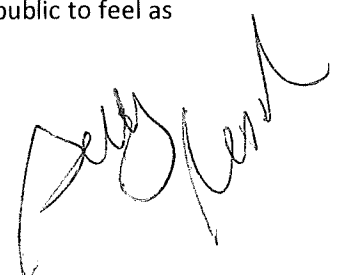
She is a good listener; she is fair and balanced in her approach to things that come her way.

#### ACHIEVEMENTS:

1. Walking into a chaotic situation and grabbing hold of it in a very timely manner. Dealing effectively and timely when she sees a problem like the trouble with the finance departments.
2. Creating protocols for staff to follow to run a tighter city.
3. Using her experience to asses and deal with a lot of new situations in a very short time, and dealing with a culture that had been established for a long time

FUTURE DEVELOPMENT: when she came to us, her family was still in MS. That was very challenging for her as she is a very devoted family person. That may have had some impact on my ideas.

1. To develop a more effective way to communicate with the commission when a situation comes up. However, we do have weekly meetings with her, that is our opportunity to timely be informed of ongoing issues and situations. We cannot expect her to call us individually each time something comes up unless it is catastrophic. Keeping our weekly one on ones is essential to helping her keep us informed.
2. There have been a couple of occasions where some idea or request has taken longer than I had hoped. However, when we discuss this in our conversations, there is usually a good reason for that and we work it out in a professional manner. The website is one example, it needs work that has taken longer than expected.
3. To continue to build and strengthen our staff. To work to improve customer service; the culture of how staff deals with the public. This is an ongoing problem with some employees. I know she is working on this. I mention it because it is so important for our public to feel as though they are respected.

A handwritten signature in black ink, appearing to read "P. Davis", is located in the bottom right corner of the page.

# CITY OF LAKE WORTH BEACH CITY MANAGER PERFORMANCE EVALUATION

**RATING:**

1. Unsatisfactory
- D Needs strengthening
3. Satisfactory Performance
4. Good Performance
5. Outstanding Performance

**COMPLETED BY:**

Vice Mayor Dr. Christopher McVoy

<b>I. Organizational Management</b>	<b>RATING: 6÷4=1.5</b>				
	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
1. Provides that the organization complies with appropriate established board procedures.	X				
2. Plans and organizes ongoing programs and services for the City Commission.		X			
3. Plans and organizes areas of concern brought to the attention of the City Manager by the City Commission or responses to public requests.		X			
4. Establishes a standard of excellence based on industry best practices for the organization.	X				
<p><b>COMMENTS/SUGGESTIONS:</b>            City Mgr reports almost non-existent; content minimal when present; has not kept Comm/public informed            Does not use City Mgr unique position in Sunshine Law to promote consensus            Has not significantly moved forward most areas of concern: city beautification; historic preservation; tree canopy; tree policy; Pool; L&amp;M St; review of zoning,...</p>					
<b>II. Fiscal Management and Budgeting</b>	<b>RATING: 14÷6=2.33</b>				
	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
1. Plans and prepares the annual budget in accordance with the priorities established by the Mayor and the City Commission with documentation and full explanation of the annual budget.	X				
2. Administers the adopted budget within the framework of the approved revenues and expenditures.		X			
3. Plans and provides for a system of reports, as requested, for the City Commission to evaluate expenses and revenues.		X			
4. Prepares and presents to the City Commission appropriate budgetary transfers, as necessary.			X		
5. Ensures actions and decisions reflect an appropriate level of responsibility for financial planning and accountability.			X		
6. Plans for, organizes and supervises the most economical utilizations of staff, materials and equipment for City services.			X		

**COMMENTS/SUGGESTIONS:**

Did not develop and present to Comm/public clear, accessible & meaningful overviews of budget  
 Did not systematically assess what is working well, what not as basis for redirection of budget  
 Slow to (or did not) correct repeated financial issues in electric utility

**III. Intermediate and Long-Range Planning****RATING:** 8÷6=1.33

1	2	3	4	5
---	---	---	---	---

1. Carries out intermediate and long-range planning concerns approved by the City Commission.	X				
---	---	--	--	--	--

2. Plans and organizes maximum utilization and maintenance of City owned assets.		X			
--	--	---	--	--	--

3. Plans and organizes a program of addressing the current needs and requirements of infrastructure and infrastructure needs of the future.	X				
---	---	--	--	--	--

4. Progress towards implementing the City Commission's vision of innovation, problem solving and solution-oriented action.	X				
--	---	--	--	--	--

5. Keeps the Mayor and City Commission aware of new or impending legislation, potential grants and developments in public policy, which may have an impact on the city.		X			
---	--	---	--	--	--

6. Maintains knowledge of new technologies, systems and methods that may enhance the City's operations.	X				
---	---	--	--	--	--

**COMMENTS/SUGGESTIONS:**

Drafting of plans has been encouraged but has not materialized  
 Underutilization of available grant opportunities; lack of plan to identify  
 Very little visible planning  
 Do not see particular interest in innovative approaches – e.g., smart cities, forward thinking parking, imaginative data analysis

**IV. Intergovernmental Relationships****RATING:** 6÷3=2.0

1	2	3	4	5
---	---	---	---	---

1. Maintains awareness of developments and plans in other jurisdictions, which may impact the City.	X				
---	---	--	--	--	--

2. Maintains communication with governmental jurisdictions in area of service that improves or enhances City programs.		X			
--	--	---	--	--	--

3. Initiates communication with other governmental entities or outside parties, which the City may be involved with or become involved.			X		
---	--	--	---	--	--

**COMMENTS/SUGGESTIONS:**

Has been late in planning for legislative asks  
 Has not developed plans, built consensus for future asks  
 Not aware of successful obtaining of city benefits from County  
 Has there been progress in obtaining more social service benefits from County?  
 Has there been progress in getting County to send back developer funds?

<b>V. Relationship with the Public</b>	<b>RATING: 10÷7=1.43</b>				
	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
1. Establishes and maintains an image of the City of Lake Worth Beach to the community that represents service, enthusiasm and professionalism.	X				
2. Ensures that an attitude and feeling of helpfulness, courtesy and sensitivity to perception exist in employees coming in contact with the public.	X				
3. Makes an effort to understand issues, concerns, and the values of the community.		X			
4. Meets with and listens to members of the community to discuss concerns and strives to understand their interests.			X		
5. Establishes and maintains a liaison with private organizations, service groups or individuals involved in areas of concern that relate to the service or activities of the City.		X			
6. Promotes and provides information to public inquiries regarding activities, services or potential employment development with the City.			X		
7. Assures that prompt and accurate information is provided to the public as appropriate.	X				
<b>COMMENTS/SUGGESTIONS:</b> Severe lack of timely, proactive communication of factual information has deepened chasms in community Customer service issues appear to persist Deficiencies in communication worsen the impression of service and professionalism					
<b>VI. Management of Employee Relationship</b>	<b>RATING: 15÷6=2.5</b>				
	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
1. Plans, organizes and maintains training of employees through in-house training or outside training.		X			
2. Maintains regular staff meetings.				X	
3. Maintains contact and professional interaction with subordinates at all levels of the organization.		X			
4. Encourages teamwork, innovation, and effective problem-solving among the staff members.		X			
5. Maintains an organization that is efficient, helpful and courteous to the employees.			X		
6. Establishes and maintains high standards for hiring and retaining employees.		X			

**COMMENTS/SUGGESTIONS:**

Points for courteousness

Serious employee concerns have gone unaddressed for long periods

**VII. Relationship with City Commission****RATING:** 13÷7=1.86

1 2 3 4 5

1. Maintains effective communication, both verbal and written with the City Commission.

X

2. Maintains availability to the City Commission.

X

3. Provides information needed for City Commission action in a timely manner and is prepared to answer questions of the City Commission.

X

4. Provides regular updates to the Council, keeping them informed about current and critical issues.

X

5. Provides for clear presentations to the City Commission in the most concise, clear and comprehensive manner possible.

X

6. Provides the City Commission with various perspectives of an issue and provides a recommendation and reason to support that recommendation.

X

7. Implements City Commission actions in accordance with the intent of the Commission and supports the actions after a decision has been reached, both inside and outside the organization.

X

**COMMENTS/SUGGESTIONS:**

Very little communication, guidance or involvement during many Commission meetings

Backup for critical agenda items frequently insufficient

Very few City Mgr reports; limited content when presented

Uneven handling of Commissioners

**VIII. Professional Development****RATING:** 9÷4=2.25

1 2 3 4 5

1. Is the City Manager viewed with respect as compared to others in Public Administration?

X

2. Does the City Manager enthusiastically seek and support professional improvement through pertinent seminars and conferences?

X

3. Does the City Manager deal effectively with other governmental managers?

X

4. Is the City Manager always interested in learning new techniques or envisioning new ways to conduct business?

X

**COMMENTS/SUGGESTIONS:**

Do not have firsthand observation of respect, effective dealing with other govt mgrs.; guess satisfactory

Have not observed interest in innovation, new techniques

**RATING:** 10÷5=2.0

**IX. Personal Characteristics**

1. Imagination: Does the City Manager show originality in approaching problems? Is she able to visualize the implications of various approaches?	X				
2. Objectivity: Is the City Manager unemotional and unbiased? Does she take a rational viewpoint based on facts and qualified opinions?			X		
3. Drive: Is the City Manager energetic, willing to spend whatever time is necessary to do a good job?		X			
4. Decisiveness: Is the City Manager able to reach timely decisions and initiate action?	X				
5. Attitude: Is the City Manager enthusiastic, cooperative and willing to adapt?			X		

**COMMENTS/SUGGESTIONS:**

The City Mgr may well spend long hours but unfortunately they are not effective  
 Does not appear to be good at delegating  
 In time management appears to have difficulty winnowing – separating wheat from chaff  
 Delayed perf review by one year  
 Lost good candidate for asst director due to delays; very slow to hire asst mgr

Tabulation: Total of 9 categories (average) =  $\frac{17.2}{9} = \underline{1.9}$   
Average

Personal Characteristics

Ratings

10 - 15 = 2.0

1. Imagination: Does the City Manager show originality in approaching problems? Is she able to visualize the implications of various approaches?	X				
2. Objectivity: Is the City Manager unemotional and unbiased? Does she take a rational viewpoint based on facts and qualified opinions?			X		
3. Drive: Is the City Manager energetic, willing to spend whatever time is necessary to do a good job?		X			
4. Decisiveness: Is the City Manager able to reach timely decisions and initiate action?	X				
5. Attitude: Is the City Manager enthusiastic, cooperative and willing to adapt?			X		

**COMMENTS/SUGGESTIONS:**

The City Mgr may well spend long hours but unfortunately they are not effective  
 Does not appear to be good at delegating  
 In time management appears to have difficulty winnowing – separating wheat from chaff  
 Delayed perf review by one year  
 Lost good candidate for asst director due to delays; very slow to hire asst mgr

Tabulation: Total of 9 categories (average) =  $\frac{17.2}{9} = \frac{1.9}{\text{Average}}$



**ACHIEVEMENTS**

List the top three achievements or strong points of the City Manager for the past twelve (12) months.

Negotiation of PBSO contract

---

---

---

---

---

**FUTURE DEVELOPMENT**

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

Timely, proactive communication of factual information through website and other means

Development of written standards for agenda backup

Preparation and presentation of written plans for key areas of city improvement

Develop approach for written assessment of city's most critical needs

---

---

\_\_\_\_\_  
Signature of Evaluator



**COMMENTS/SUGGESTIONS:**

TOTAL SCORE  $28 \div 6 = 4.6$

**III. Intermediate and Long-Range Planning**

**RATING**

1 2 3 4 5

1. Carries out intermediate and long-range planning concerns approved by the City Commission.

X

2. Plans and organizes maximum utilization and maintenance of City owned assets.

X

3. Plans and organizes a program of addressing the current needs and requirements of infrastructure and infrastructure needs of the future.

X

4. Progress towards implementing the City Commission's vision of innovation, problem solving and solution-oriented action.

X

5. Keeps the Mayor and City Commission aware of new or impending legislation, potential grants and developments in public policy, which may have an impact on the city.

X

6. Maintains knowledge of new technologies, systems and methods that may enhance the City's operations.

X

**COMMENTS/SUGGESTIONS:**

I feel as though being one year in, has not given adequate time to have our Strategic Plan completed

TOTAL SCORE  $22 \div 6 = 3.6$

**IV. Intergovernmental Relationships**

**RATING**

1 2 3 4 5

1. Maintains awareness of developments and plans in other jurisdictions, which may impact the City.

X

2. Maintains communication with governmental jurisdictions in area of service that improves or enhances City programs.

X

3. Initiates communication with other governmental entities or outside parties, which the City may be involved with or become involved.

X

**COMMENTS/SUGGESTIONS:**

TOTAL SCORE  $12 \div 3 = 4$



V. Relationship with the Public	RATING				
	1	2	3	4	5
1. Establishes and maintains an image of the City of Lake Worth Beach to the community that represents service, enthusiasm and professionalism.				X	
2. Ensures that an attitude and feeling of helpfulness, courtesy and sensitivity to perception exist in employees coming in contact with the public.					X
3. Makes an effort to understand issues, concerns, and the values of the community.					X
4. Meets with and listens to members of the community to discuss concerns and strives to understand their interests.				X	
5. Establishes and maintains a liaison with private organizations, service groups or individuals involved in areas of concern that relate to the service or activities of the City.					X
6. Promotes and provides information to public inquiries regarding activities, services or potential employment development with the City.				X	
7. Assures that prompt and accurate information is provided to the public as appropriate.				X	

**COMMENTS/SUGGESTIONS:**

Having a C.M. who takes time to be involved is imperative. As for the past year I believe due to getting settle in, Carmen did well and will only improve.

TOTAL SCORE  $31 \div 7 = 4.4$

VI. Management of Employee Relationship	RATING				
	1	2	3	4	5
1. Plans, organizes and maintains training of employees through in-house training or outside training.					X
2. Maintains regular staff meetings.					X
3. Maintains contact and professional interaction with subordinates at all levels of the organization.				X	
4. Encourages teamwork, innovation, and effective problem-solving among the staff members.				X	
5. Maintains an organization that is efficient, helpful and courteous to the employees.				X	
6. Establishes and maintains high standards for hiring and retaining employees.					X

**COMMENTS/SUGGESTIONS:**

Employee's, their success & how valued they feel is something I think Carmen takes seriously + prioritizes

TOTAL SCORE 27 ÷ 6 = 4.5

**VII. Relationship with City Commission**

**RATING**

1 2 3 4 5

1. Maintains effective communication, both verbal and written with the City Commission.

2. Maintains availability to the City Commission.

3. Provides information needed for City Commission action in a timely manner and is prepared to answer questions of the City Commission.

4. Provides regular updates to the Council, keeping them informed about current and critical issues.

5. Provides for clear presentations to the City Commission in the most concise, clear and comprehensive manner possible.

6. Provides the City Commission with various perspectives of an issue and provides a recommendation and reason to support that recommendation.

7. Implements City Commission actions in accordance with the intent of the Commission and supports the actions after a decision has been reached, both inside and outside the organization.

**COMMENTS/SUGGESTIONS:**

TOTAL SCORE 28 ÷ 7 = 4

**VIII. Professional Development**

**RATING**

1 2 3 4 5

1. Is the City Manager viewed with respect as compared to others in Public Administration?

2. Does the City Manager enthusiastically seek and support professional improvement through pertinent seminars and conferences?

3. Does the City Manager deal effectively with other governmental managers?

4. Is the City Manager always interested in learning new techniques or envisioning new ways to conduct business?

**COMMENTS/SUGGESTIONS:**

TOTAL SCORE 20 ÷ 4 = 5

**RATING**

### IX. Personal Characteristics

	1	2	3	4	5
1. Imagination: Does the City Manager show originality in approaching problems? Is she able to visualize the implications of various approaches?					X
2. Objectivity: Is the City Manager unemotional and unbiased? Does she take a rational viewpoint based on facts and qualified opinions?				X	
3. Drive: Is the City Manager energetic, willing to spend whatever time is necessary to do a good job?				X	
4. Decisiveness: Is the City Manager able to reach timely decisions and initiate action?				X	
5. Attitude: Is the City Manager enthusiastic, cooperative and willing to adapt?					X

**COMMENTS/SUGGESTIONS:**

TOTAL SCORE  $22 \div 5 = 4.4$

Tabulation: Total of 9 categories (average) =  $\frac{38.5}{9} = 4.2777777$   
Average



## ACHIEVEMENTS

List the top three achievements or strong points of the City Manager for the past twelve (12) months.

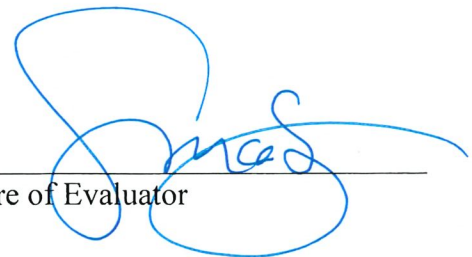
- The Budget Process was Seamless and Effective time Management.
- investigating the finance department and implementing staff changes to increase morale + productivity.
- Building working relationships with county + state staff
- Creating new policies when finding errors

## FUTURE DEVELOPMENT

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

- Finalize Strategic Plan For the City.
- Improve Processes for Residents + Business owner in regards to information access.
- Attend more citywide events (Prime, 4th of July, etc)

Signature of Evaluator



# CITY OF LAKE WORTH BEACH CITY MANAGER PERFORMANCE EVALUATION

**RATING:**

1. Unsatisfactory
2. Needs strengthening
3. Satisfactory Performance
4. Good Performance
5. Outstanding Performance

**COMPLETED BY:** Commissioner Stokes

<b>I. Organizational Management</b>	<b>RATING</b>				
	1	2	3	4	5
1. Provides that the organization complies with appropriate established board procedures.		X			
2. Plans and organizes ongoing programs and services for the City Commission.	X				
3. Plans and organizes areas of concern brought to the attention of the City Manager by the City Commission or responses to public requests.	X				
4. Establishes a standard of excellence based on industry best practices for the organization.		X			
<p><b>COMMENTS/SUGGESTIONS:</b></p> <p>Work with the mayor to ensure she has everything she needs to run a fair and professional meeting that follows the rules adopted by the commission. Hold directors accountable for decisions that lead to large deficits in the budget. Investigate source of discrepancies in the budget. Instead of helping other elected officials remove access to services provided by non-profits, work with the commission to expand services using restricted funds from ARPA.</p> <p style="text-align: right;">TOTAL SCORE: <math>6 \div 4 = 1.5</math></p>					
<b>II. Fiscal Management and Budgeting</b>	<b>RATING</b>				
	1	2	3	4	5
1. Plans and prepares the annual budget in accordance with the priorities established by the Mayor and the City Commission with documentation and full explanation of the annual budget.	X				
2. Administers the adopted budget within the framework of the approved revenues and expenditures.		X			
3. Plans and provides for a system of reports, as requested, for the City Commission to evaluate expenses and revenues.		X			
4. Prepares and presents to the City Commission appropriate budgetary transfers, as necessary.	X				
5. Ensures actions and decisions reflect an appropriate level of responsibility for financial planning and accountability.	X				
6. Plans for, organizes and supervises the most economical utilizations of staff, materials and equipment for City services.	X				



**COMMENTS/SUGGESTIONS:**

Speak to commissioners about your suggestions for how to allocate funds before publishing them in the backup. Explain your rationale based on the priorities of the commission and how you decided which projects or services should be funded. Be able to explain why we went over budget in personnel expenses for every department. Make sure the public and commission have information presented in a clear and transparent way regarding the rates for the Electric Utility.

TOTAL SCORE:  $8 \div 6 = 1.3$ **III. Intermediate and Long-Range Planning****RATING**

1	2	3	4	5
---	---	---	---	---

1. Carries out intermediate and long-range planning concerns approved by the City Commission.	X				
---	---	--	--	--	--

2. Plans and organizes maximum utilization and maintenance of City owned assets.	X				
--	---	--	--	--	--

3. Plans and organizes a program of addressing the current needs and requirements of infrastructure and infrastructure needs of the future.		X			
---	--	---	--	--	--

4. Progress towards implementing the City Commission's vision of innovation, problem solving and solution-oriented action.	X				
--	---	--	--	--	--

5. Keeps the Mayor and City Commission aware of new or impending legislation, potential grants and developments in public policy, which may have an impact on the city.	X				
---	---	--	--	--	--

6. Maintains knowledge of new technologies, systems and methods that may enhance the City's operations.			X		
---	--	--	---	--	--

**COMMENTS/SUGGESTIONS:**

Ensure the CRA and City are on the same page for moving the development of the downtown properties forward. Present a viable plan for enhancing the oceanfront property. Instead of putting up roadblocks for partnerships, find ways to remove barriers. Work with our lobbyist and other legislative aids to submit projects in a timely manner for funding. Apprise commission of negotiations involving city-owned property before putting the final agreement on the agenda.

TOTAL SCORE:  $9 \div 6 = 1.5$ **IV. Intergovernmental Relationships****RATING**

1	2	3	4	5
---	---	---	---	---

1. Maintains awareness of developments and plans in other jurisdictions, which may impact the City.		X			
---	--	---	--	--	--

2. Maintains communication with governmental jurisdictions in area of service that improves or enhances City programs.		X			
--	--	---	--	--	--

3. Initiates communication with other governmental entities or outside parties, which the City may be involved with or become involved.				X	
---	--	--	--	---	--

**COMMENTS/SUGGESTIONS:**

Continue building relationships with other municipalities and organizations but not at the expense of other work. These efforts should not result in missed or delayed appointments with elected officials. Continue work on securing agreements to sell our water to other towns and municipalities.

TOTAL SCORE:  $8 \div 3 = 2.7$

<b>V. Relationship with the Public</b>	<b>RATING</b>				
	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
1. Establishes and maintains an image of the City of Lake Worth Beach to the community that represents service, enthusiasm and professionalism.		X			
2. Ensures that an attitude and feeling of helpfulness, courtesy and sensitivity to perception exist in employees coming in contact with the public.	X				
3. Makes an effort to understand issues, concerns, and the values of the community.		X			
4. Meets with and listens to members of the community to discuss concerns and strives to understand their interests.		X			
5. Establishes and maintains a liaison with private organizations, service groups or individuals involved in areas of concern that relate to the service or activities of the City.		X			
6. Promotes and provides information to public inquiries regarding activities, services or potential employment development with the City.		X			
7. Assures that prompt and accurate information is provided to the public as appropriate.	X				
<p><b>COMMENTS/SUGGESTIONS:</b>            Improve customer service in all areas of the organization. Find a way for residents to receive help navigating the various city departments. Identify when there is a lack of information on a certain topic available to the public and find ways to correct misinformation in a timely manner. Be proactive in finding ways to listen to members of the community that are not already engaged. Hold directors accountable to providing clear and complete backup for all agenda items.</p> <p style="text-align: right;">TOTAL SCORE: <math>12 \div 7 = 1.7</math></p>					
<b>VI. Management of Employee Relationship</b>	<b>RATING</b>				
	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
1. Plans, organizes and maintains training of employees through in-house training or outside training.		X			
2. Maintains regular staff meetings.			X		
3. Maintains contact and professional interaction with subordinates at all levels of the organization.	X				
4. Encourages teamwork, innovation, and effective problem-solving among the staff members.		X			
5. Maintains an organization that is efficient, helpful and courteous to the employees.		X			
6. Establishes and maintains high standards for hiring and retaining employees.	X				

**COMMENTS/SUGGESTIONS:**

Continue to support professional development opportunities for staff. Do not allow the lineman apprenticeship program to be jeopardized again or the workers to be retaliated against when advocating for themselves. Set an example of a problem-solving attitude and hold directors accountable for modeling the same behavior. Use tools that every other professional organization uses to elicit feedback from employees at all levels, such as an anonymous employee satisfaction survey.

TOTAL SCORE  $11 \div 6 = 1.8$

**VII. Relationship with City Commission**

RATING				
1	2	3	4	5
X				
	X			
X				
X				
X				
	X			
X				

1. Maintains effective communication, both verbal and written with the City Commission.

2. Maintains availability to the City Commission.

3. Provides information needed for City Commission action in a timely manner and is prepared to answer questions of the City Commission.

4. Provides regular updates to the Council, keeping them informed about current and critical issues.

5. Provides for clear presentations to the City Commission in the most concise, clear and comprehensive manner possible.

6. Provides the City Commission with various perspectives of an issue and provides a recommendation and reason to support that recommendation.

7. Implements City Commission actions in accordance with the intent of the Commission and supports the actions after a decision has been reached, both inside and outside the organization.

**COMMENTS/SUGGESTIONS:**

Do not allow the commission to be surprised by news from the public, newspaper, or backup on an agenda item. Be proactive in providing accurate and relevant information to the commission regarding items that are not part of everyday business. Find ways to make sure you have consensus on items before spending a lot of time on them that do not require you to wait for a pre-agenda meeting. Check your assumptions with commissioners in your one-on ones. Initiate performance review process so that it can be completed in a timely manner as dictated by your contract.

TOTAL SCORE:  $9 \div 7 = 1.3$

**VIII. Professional Development**

RATING				
1	2	3	4	5
	X			
			X	
		X		
X				

1. Is the City Manager viewed with respect as compared to others in Public Administration?

2. Does the City Manager enthusiastically seek and support professional improvement through pertinent seminars and conferences?

3. Does the City Manager deal effectively with other governmental managers?

4. Is the City Manager always interested in learning new techniques or envisioning new ways to conduct business?

**COMMENTS/SUGGESTIONS:**

Demonstrate how you incorporate learnings from the various conferences and other networking opportunities you attend.

TOTAL SCORE  $10 \div 4 = 2.5$

**IX. Personal Characteristics****RATING**

	1	2	3	4	5
1. Imagination: Does the City Manager show originality in approaching problems? Is she able to visualize the implications of various approaches?	X				
2. Objectivity: Is the City Manager unemotional and unbiased? Does she take a rational viewpoint based on facts and qualified opinions?		X			
3. Drive: Is the City Manager energetic, willing to spend whatever time is necessary to do a good job?		X			
4. Decisiveness: Is the City Manager able to reach timely decisions and initiate action?		X			
5. Attitude: Is the City Manager enthusiastic, cooperative and willing to adapt?	X				

**COMMENTS/SUGGESTIONS:**

Shift mindset from “we can’t” to “how can we”. Don’t rush to defend actions or positions from staff but be open to other viewpoints while acknowledging their expertise. Delegate responsibilities more to free up your time to focus on the bigger picture.

TOTAL SCORE  $8 \div 5 = 1.6$

Tabulation: Total of 9 categories (average) =  $15.9 \div 9 = 1.77$

## **ACHIEVEMENTS**

List the top three achievements or strong points of the City Manager for the past twelve (12) months.

1. City Manager Davis remains calm under pressure.
2. City Manager Davis has been involved in conversations with the Town of Palm Beach in hopes of reaching an agreement for the City of Lake Worth Beach's Water Utility to contract with them.
3. City Manager Davis has attended various professional development and networking events.

## **FUTURE DEVELOPMENT**

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

1. Improve communication with the public and elected officials.
2. Develop a problem-solving mindset.
3. Hire and retain quality employees in a timely manner.

## **ADDITIONAL COMMENTS**

- ❖ A strong relationship between the city manager and elected officials is critical in order to be effective in achieving the commission's goals. It is also crucial for an evaluation to occur annually to provide the commission as a whole an opportunity to give feedback to the city manager. I am very disappointed in the amount of effort I had to put into ensuring we are even having this evaluation. It has put a great strain on my relationship with the manager. On January 11, 2023 I mentioned in a public meeting that the city manager had been here a year and we should be thinking about the annual performance review. After telling me she was working on it, there is not one action she took that wasn't prompted by myself. I had to have multiple conversations with the city manager and city attorney as well add 2 discussion items to different agendas just to get us here 11 months later.

---

Signature of Evaluator

# CITY OF LAKE WORTH BEACH CITY MANAGER PERFORMANCE EVALUATION

**RATING:**

1. Unsatisfactory
2. Needs strengthening
3. Satisfactory Performance
4. Good Performance
5. Outstanding Performance

**COMPLETED BY:**

Comm. Reinaldo Diaz

<b>I. Organizational Management</b>	<b>RATING</b>				
	1	2	3	4	5
1. Provides that the organization complies with appropriate established board procedures.	X				
2. Plans and organizes ongoing programs and services for the City Commission.		X			
3. Plans and organizes areas of concern brought to the attention of the City Manager by the City Commission or responses to public requests.	X				
4. Establishes a standard of excellence based on industry best practices for the organization.		X			
<p><b>COMMENTS/SUGGESTIONS:</b>            Overall the city organization is ok when it comes to operation, but I have major concerns over how meetings are run. From the planning, back up preparation, to how information is presented at meetings and the overall decorum and efficiency of our meetings. It seems that quite often the commission brings up areas of concern or ideas to the manager, even when there is consensus and big community support, and those ideas don't come to fruition.</p> <p style="text-align: right;">TOTAL SCORE ___ ÷ 4 = ___</p>					
<b>II. Fiscal Management and Budgeting</b>	<b>RATING</b>				
	1	2	3	4	5
1. Plans and prepares the annual budget in accordance with the priorities established by the Mayor and the City Commission with documentation and full explanation of the annual budget.			X		
2. Administers the adopted budget within the framework of the approved revenues and expenditures.				X	
3. Plans and provides for a system of reports, as requested, for the City Commission to evaluate expenses and revenues.			X		
4. Prepares and presents to the City Commission appropriate budgetary transfers, as necessary.				X	
5. Ensures actions and decisions reflect an appropriate level of responsibility for financial planning and accountability.				X	
6. Plans for, organizes and supervises the most economical utilizations of staff, materials and equipment for City services.			X		

**COMMENTS/SUGGESTIONS:**

Staff has done a great job in improving the budget process this last round. Once the budget is adopted it is carried out very well with no concerns. There have been a couple instances where a budget item was presented despite not having clear consensus on the dais. There are still particular processes in the budget that are clunky, but I know are in the process of being cleaned up and improved. There is room to improve how to present the budget to the public, for transparency I feel that we could do better in publishing material that clearly explains where money is coming from and how it's spent.

TOTAL SCORE \_\_\_ ÷ 6 = \_\_\_

**III. Intermediate and Long-Range Planning****RATING**

	1	2	3	4	5
1. Carries out intermediate and long-range planning concerns approved by the City Commission.		X			
2. Plans and organizes maximum utilization and maintenance of City owned assets.		X			
3. Plans and organizes a program of addressing the current needs and requirements of infrastructure and infrastructure needs of the future.			X		
4. Progress towards implementing the City Commission's vision of innovation, problem solving and solution-oriented action.		X			
5. Keeps the Mayor and City Commission aware of new or impending legislation, potential grants and developments in public policy, which may have an impact on the city.	X				
6. Maintains knowledge of new technologies, systems and methods that may enhance the City's operations.			X		

**COMMENTS/SUGGESTIONS:**

Again, it seems that there are often community led or commission requested projects or ideas requested that are not carried out, despite having clear consensus and popularity. Town hall and community interactive meetings are often delayed and not frequent enough, these should be a priority. There have been a couple recent problems where I've learned about seriously concerning controversial decisions being made through the community or headlines rather than being updated by the city manager.

TOTAL SCORE \_\_\_ ÷ 6 = \_\_\_

**IV. Intergovernmental Relationships****RATING**

	1	2	3	4	5
1. Maintains awareness of developments and plans in other jurisdictions, which may impact the City.		X			
2. Maintains communication with governmental jurisdictions in area of service that improves or enhances City programs.		X			
3. Initiates communication with other governmental entities or outside parties, which the City may be involved with or become involved.				X	

**COMMENTS/SUGGESTIONS:**

I'm not sure we look at other jurisdictions often enough. A couple of my asks which have not come to fruition were inspired by other jurisdictions.

TOTAL SCORE \_\_\_ ÷ 3 = \_\_\_



<b>V. Relationship with the Public</b>	<b>RATING</b>				
	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
1. Establishes and maintains an image of the City of Lake Worth Beach to the community that represents service, enthusiasm and professionalism.				X	
2. Ensures that an attitude and feeling of helpfulness, courtesy and sensitivity to perception exist in employees coming in contact with the public.				X	
3. Makes an effort to understand issues, concerns, and the values of the community.					X
4. Meets with and listens to members of the community to discuss concerns and strives to understand their interests.					X
5. Establishes and maintains a liaison with private organizations, service groups or individuals involved in areas of concern that relate to the service or activities of the City.			X		
6. Promotes and provides information to public inquiries regarding activities, services or potential employment development with the City.				X	
7. Assures that prompt and accurate information is provided to the public as appropriate.	X				
<p><b>COMMENTS/SUGGESTIONS:</b>  City manager is respectful and professional when it comes to dealing with the public, she attends public events and I know has developed relationships with some members of the community. There have been quite a few instances where I feel there has been a failure to provide information to the public. More specifically, to respond to misinformation aimed at blaming the city staff for various issues. There needs to be more pride in our staff and we need to dispel any rumors or misinformation presented on how our city operates. It's critical to keep the community properly informed and educated.</p> <p style="text-align: right;">TOTAL SCORE ___ ÷ 7 = ___</p>					
<b>VI. Management of Employee Relationship</b>	<b>RATING</b>				
	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
1. Plans, organizes and maintains training of employees through in-house training or outside training.			X		
2. Maintains regular staff meetings.					X
3. Maintains contact and professional interaction with subordinates at all levels of the organization.					X
4. Encourages teamwork, innovation, and effective problem-solving among the staff members.			X		
5. Maintains an organization that is efficient, helpful and courteous to the employees.			X		
6. Establishes and maintains high standards for hiring and retaining employees.	X				

**COMMENTS/SUGGESTIONS:**

It's clear that city manager does stay informed from city staff regarding employee issues, especially sensitive personal issues. There's been a few instances where I've brought up a particular employees sensitive life issue with the intention of how we can help them, and it's almost always already being worked on. Hiring process is lacking and causes serious concern. We've lost potential staff, including one high level, due to slow on boarding process. It's critical to provide a work culture that offers opportunities and benefits to make up for our uncompetitive pay. I feel this should be the top priority but it's not being taken seriously enough.

TOTAL SCORE \_\_\_ ÷ 6 = \_\_\_

**VII. Relationship with City Commission****RATING**

1	2	3	4	5
---	---	---	---	---

1. Maintains effective communication, both verbal and written with the City Commission.	X				
---	---	--	--	--	--

2. Maintains availability to the City Commission.				X	
---	--	--	--	---	--

3. Provides information needed for City Commission action in a timely manner and is prepared to answer questions of the City Commission.	X				
--	---	--	--	--	--

4. Provides regular updates to the Council, keeping them informed about current and critical issues.	X				
--	---	--	--	--	--

5. Provides for clear presentations to the City Commission in the most concise, clear and comprehensive manner possible.				X	
--	--	--	--	---	--

6. Provides the City Commission with various perspectives of an issue and provides a recommendation and reason to support that recommendation.			X		
--	--	--	---	--	--

7. Implements City Commission actions in accordance with the intent of the Commission and supports the actions after a decision has been reached, both inside and outside the organization.	X				
---	---	--	--	--	--

**COMMENTS/SUGGESTIONS:**

This is the area of my greatest concern. Too many times I have learned of sensitive, controversial decisions being planned though the community or through the news, even issues within my district. Generally meeting preparation is ok, especially regarding normal operations type of work. But controversial or profound issues that lead to big community response I feel left in the dark until it's too late.

TOTAL SCORE \_\_\_ ÷ 7 = \_\_\_

**VIII. Professional Development****RATING**

1	2	3	4	5
---	---	---	---	---

1. Is the City Manager viewed with respect as compared to others in Public Administration?			X		
--	--	--	---	--	--

2. Does the City Manager enthusiastically seek and support professional improvement through pertinent seminars and conferences?				X	
---	--	--	--	---	--

3. Does the City Manager deal effectively with other governmental managers?		X			
---	--	---	--	--	--

4. Is the City Manager always interested in learning new techniques or envisioning new ways to conduct business?		X			
--	--	---	--	--	--

**COMMENTS/SUGGESTIONS:**

This is a difficult one to answer because I can't speak on behalf of other administrators. But I have received a considerable amount of criticism from the community and even nonprofits and other organizations in our city.

TOTAL SCORE \_\_\_ ÷ 4 = \_\_\_

**RATING**

<b>IX. Personal Characteristics</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
1. Imagination: Does the City Manager show originality in approaching problems? Is she able to visualize the implications of various approaches?		X			
2. Objectivity: Is the City Manager unemotional and unbiased? Does she take a rational viewpoint based on facts and qualified opinions?		X			
3. Drive: Is the City Manager energetic, willing to spend whatever time is necessary to do a good job?			X		
4. Decisiveness: Is the City Manager able to reach timely decisions and initiate action?	X				
5. Attitude: Is the City Manager enthusiastic, cooperative and willing to adapt?			X		
<b>COMMENTS/SUGGESTIONS:</b> A top comment I get from the community is that our city manager is nice and personable, and easy to approach. The criticism usually stems from getting an inadequate response or lack of action on issues. City manager has demonstrated to me a profound understanding of important and historic community planning issues such as redlining, environmental racism, and gentrification. I'm often disappointed that we don't hear enough of her perspective and insight on such issues at public meetings.					
TOTAL SCORE ___ ÷ 5 = ___					

Tabulation: Total of 9 categories (average) = \_\_\_ ÷ 9 =             
Average

**ACHIEVEMENTS**

List the top three achievements or strong points of the City Manager for the past twelve (12) months.

Working toward the strategic plan, with the intention of incorporating the mobility and housing studies among others.

When mistakes have been made, the response to fix them has been fairly quick.

---

---

---

---

**FUTURE DEVELOPMENT**

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

Detailed strategic plan with measurable performance measures and goals.

Better planning of legislative and grant asks.

Publishing information to dispel rumors and misinformation directed at staff and city.

---

---

---

---

\_\_\_\_\_  
Signature of Evaluator