

EXHIBIT B

CITY MANAGER EVALUATION FORM

CITY OF MARCO ISLAND CITY MANAGER PERFORMANCE EVALUATION - FY 2023/24

RATING:

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

TOTAL COMPILED RATING:

Organizational Management Compiled Rating: 3.25	RATING				
	1	2	3	4	5
1. Provides that the organization does not violate the agreement or appropriate established board procedures.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
2. Plans and organizes ongoing programs and services to the City Council.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Plans and organizes areas of concern brought to the attention of the City Manager by the City Council or responses to public requests.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. Evaluates new and innovative technology as it may relate to areas of concern in the improvement of the City.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
COMMENTS/SUGGESTIONS (Indicate if additional pages are attached):					

Fiscal Management Compiled Rating: 4.125	RATING				
	1	2	3	4	5
1. Includes the City Council in preparations of the annual budget.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
2. Plans and prepares the annual budget with the input of the City Council with documentation and full explanation of the annual budget.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
3. Administers the adopted budget within the framework of the approved revenues and expenditures.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
4. Plans and provides for a system of reports, as requested, for the City Council to evaluate expenses and revenues.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. Prepares and presents to the City Council appropriate budgetary transfers, as necessary.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. Plans and provides necessary information for the City Council which requires bonding or borrowing of funds for long term projects.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. Plans for, organizes and supervises the most economical utilizations of manpower, materials and equipment for City services.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
8. Plans and provides for future economic growth in relationship to projected revenues and expenditures.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
COMMENTS/SUGGESTIONS (Indicate if additional pages are attached):					

Intermediate and Long-Range Planning Compiled Rating: 2.57		RATING				
		1	2	3	4	5
1. Plans and organizes a process of program planning in anticipating the future of the City.		<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Plans and organizes maximum utilization and maintenance of City owned equipment.		<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Plans and organizes a program of addressing the current needs and requirements of infrastructure and infrastructure needs of the future.		<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. Has a vision of the future for the city of Marco Island and shares that vision with the City Council and the public.		<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. Keeps the City Council aware of new or impending legislation, potential grants and developments in the public policy, which may have an impact on the city.		<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. Maintains knowledge of new technologies, systems and methods that may enhance the City's economics.		<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. Carries out intermediate and long-range planning concerns approved by the City Council.		<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
COMMENTS/SUGGESTIONS (Indicate if additional pages attached) 						
Intergovernmental Relationships Compiled Rating: 3		RATING				
		1	2	3	4	5
1. Maintains awareness of developments and plans in other jurisdictions, which may impact the City.		<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Maintains communication with governmental jurisdictions in area of service that improves or enhances City programs		<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Initiates communication with other governmental entities or outside parties, which the City may be involved with or become involved.		<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. Attends and relays appropriate information from current intergovernmental agreement meetings to the City Council.		<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. Willingness to participate with other governmental entities in sharing resources or equipment.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
COMMENTS/SUGGESTIONS (Indicate if additional pages are attached): 						

<p>Relationship with the Public</p> <p>Compiled Rating: 4.75</p>	RATING				
	1	2	3	4	5
<p>1. Ensures that an attitude and feeling of helpfulness, courtesy and sensitivity to perception exist in employees coming in contact with the public.</p> <p>2. Establishes and maintains an image of the City of Marco Island to the community that represents service, enthusiasm and professionalism.</p> <p>3. 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.</p> <p>4. Promote and provide information to public inquiries regarding activities, services or potential employment development with the City.</p>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
<p>COMMENTS/SUGGESTIONS (Indicate if additional pages attached):</p>					
<p>Management of Employees and Relationship</p> <p>Compiled Rating: 4.14</p>	RATING				
	1	2	3	4	5
<p>1. Plans, organizes and maintains training of employees through in-house training or outside training.</p> <p>2. Maintains regular staff meetings.</p> <p>3. Maintains contact and professional interaction with subordinates at all levels of the organization.</p> <p>4. Ability to appropriately motivate and discipline employees for peak performance.</p> <p>5. Equitably handles problem of grievances among subordinate employees.</p> <p>6. Maintains an organization that is efficient, helpful and courteous to the public and to the employees.</p> <p>7. Provides for annual evaluation of all employees.</p>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
<p>COMMENTS/SUGGESTIONS (Indicate if additional pages are attached):</p>					

Relationship with City Council Compiled Rating: 3.7	RATING				
	1	2	3	4	5
1. Maintains effective communication, both verbal and written with the City Council.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
2. Maintains availability to the City Council.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
3. Provides information needed for City Council action in a timely manner.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
4. Establishes a system of reporting to the City Council on the current plans and activities of the City.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
5. Provides for clear presentations to the City Council in the most concise, clear and comprehensive manner possible.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. Provides the City Council with all perspectives of an issue and provides a recommendation and reason to support that recommendation.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
7. Always prepared to answer questions of the City Council.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
COMMENTS/SUGGESTIONS (Indicate if additional pages are attached):					
Professional Development Compiled Rating: 4.25	RATING				
	1	2	3	4	5
1. Is the City Manager viewed with respect as compared to others in Public Administration?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
2. Does the City Manager enthusiastically seek and support professional improvement through pertinent seminars and conferences?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
3. Does the City Manager deal effectively with other governmental managers?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
4. Is the City Manager always interested in learning new techniques or envisioning new ways to conduct business?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
COMMENTS/SUGGESTIONS (Indicate if additional pages are attached):					

Personal Characteristics Compiled Rating: 4	RATING				
	1	2	3	4	5
1. Imagination: Does the City Manager show originality in approaching problems? Able to visualize the implications of various approaches?	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
2. Objectivity: Is the City Manager unemotional and unbiased? Take a rational viewpoint based on facts and qualified opinions?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
3. Drive: Is the City Manager energetic, willing to spend whatever time is necessary to do a good job?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
4. Decisiveness: Is the City Manager able to reach timely decisions and initiate action?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
5. Attitude: Is the City Manager enthusiastic, cooperative and willing to adapt?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
COMMENTS/SUGGESTIONS (Indicate if additional pages are attached):					

OTHER COMMENTS THAT MAY BE RELEVANT TO THIS EVALUATION
(Indicate if additional pages are attached):

Signature: _____ *Joe Rola* _____

Print Name: _____ *Joe Rola* _____

Date: _____ *11 Aug.2024* _____

CITY MANAGER 2024 AREAS OF FOCUS - EVALUATION FORM

RATING:

1. Unsatisfactory: Performance is well below requirements and must be immediately corrected
2. Needs Strengthening: Performance is inconsistent or does not generally meet requirements.
3. Satisfactory Performance: Performance is acceptable and meets job requirements.
4. Good Performance: Performance surpasses job requirements.
5. Outstanding Performance: Behavior or performance exhibits outstanding effort which clearly and significantly is above the norm. Performance has substantially enhanced City efficiency and effectiveness.

TOTAL COMPILED RATING:

Capital Projects – Weight 30% Compiled Rating: <u>4</u>	RATING				
	1	2	3	4	5
1. Island-wide Traffic Congestion Study <ul style="list-style-type: none">• Present final report to City Council• Go to bid this fiscal year on Collier/Barfield intersection improvements	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
2. North Marco Utility Acquisition and integration <ul style="list-style-type: none">• Bring all documents to City Council for approval• Completed closing of transition• Collapse existing company• Integrate NMU customers into City Utility system	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
3. Winterberry Bridge Replacement Identify appropriate funding sources <ul style="list-style-type: none">• Identify appropriate funding sources• Design approved and project out to bid by first quarter, 2024• City Council award construction contract by second quarter, 2024	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
4. Canal Water Quality Projects <u>4a</u> • Aeration pilot project – design/cost estimate completed <u>4b</u> • Canal Interconnects – Hydrodynamic study completed and presented to City Council <u>4c</u> • Continue advancement of DEP 4e Alternative Restoration Plan	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments (Indicate is additional pages are attached):

b

1a Island wide Traffic Congestion Study - This task is another example of hiring the right consultant and applying him to the job. His report and recommendations were right on the mark. The only issue going forward is for us to recognize that even with the completion of his suggestions and the Improvements of the Collier/Barfield intersection, The "Fix" is only an illusive, temporary fix. Our staff needs to be able to readjust the network o f all 10 Traffic signalling equipments and to maintain this more complex system in a timely fashion. Additionally, Marco Island must face the limitations of Build Out, There are only so much roadways and other traffic enhancing infrastructure that we will be able to squeeze out of our limited island (Green Space) space. We don't have to accomodate every "visitor" to SW Florida.

2. North Marco Utility Acquisition and Integration - This task was divided into 4 parts and I applied the reating system to each part as follows: 2a = 3, 2b = 5, 2c = 5 and 2d = 5.

3. Winterberry bridge repair. The choice to proceed with a "through repair " of the winterberry as opposed to a "Rebuild"

Fiscal Management – Weight 20%

RATING

1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Compiled Rating:

1. Present City Council with FY 2024-25 City budget applying the rollback Millage Rate for adoption

Comments (Indicate is additional pages are attached):

1. This is a fine piece of work though extremely detailed (beyond my pay grade), but positioned us to react to changing budget issues and still allow us to position Marco Island's 2025 budget within Rollback. Your financial department and your CFO always does and outstanding job and seems to have all the reasonable answers on the tip of their tongues.

5

Land Use and permitting issues – Weight 25%	RATING				
	1	2	3	4	5
Compiled Rating: <u>2</u>					
2. Present completed Olde Marco zoning certificate inventory to City Council by February 1, 2024.	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Complete public process related to development of the Olde Marco Redevelopment Master Plan.	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. Complete the unwinding of the Vacation Rental registration program with wrap-up accounting to City Council	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. Successfully complete Growth Management Permitting "Community engagement" process and related internal process review.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Comments (Indicate is additional pages are attached):					
2. Where is the Data? What did it show? If my memory serves me correctly, there was not much difference since the last tabulation was done in 2015, except that there are significantly more non-compliant businesses that are not accurately updating their CLUZA certs when they make a change to their seating or other business profile, and there is NO emphasis on enforcing our codes related to CLUZA Updating. This is a Major problem and Old Marco is only the tip of the iceberg when compared to the entire business community on the rest of the island. How can you plan community development (Parking) when you dont maintain accurate records and enforce our codes? 3. I don't remember and consultant presentation of interim results. Either we did not get an interim status or the results were insignificant. What is the target date for the "punch line", the presentation of the "Master Plan"?					

Internal / Organizational Issues – Weight 15%	RATING				
	1	2	3	4	5
Compiled Rating: <u>2.5</u>					
1. Complete "360 Evaluation" process	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Implement expanded supervisory training, including appropriate certification for Purchasing/Risk Management	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Comments (Indicate is additional pages are attached):					
1. What were the results from this "360 Evaluation" process. I know staff was going through some process, but what was the outcome? How did the staff or the community benefit?					

Other – Weight 10% Compiled Rating:	RATING				
	1	2	3	4	5
1. Expand utilization of Veterans Community Park and the Unity bandshell	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Identify and support Island-wide beautification efforts. • Seek funding options for beach access beautification • Identify a process and funding for replacement of electrical box wraps	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Comments (Indicate if additional pages are attached):					
<p>1. There is something about "expanding the use of Veterans Community Park and the Band Shell" that doesn't look right to me. The original purpose of acquiring the Park for \$10 M was to conserve Green Space and Stop High rise development in town center. We dump another \$12 M into the Band shell and toilet facilities plus some additional "Stuff" and now we are beating the bushes to keep it used?</p> <p>2a. Beach access Beautification -"Visitor gotta have"? Why are we spending \$\$\$ to enhance the lighting along the beach accesses when the County does Not support after sunset use of the beaches off Marco Island? And what about the extra police presence that we are going to be required to maintain to support 24 hr/day operation of a beach for "Visitors"?</p> <p>2b. Electrical Box wraps - OK.</p>					

Signature:



Print Name:

JOSEPH ROLA

Date:

8/12/2024

Capital Projects (continued from page 1 of 5

3. Winterberry Bridge Replacement - The ultimate selection of a (through) Repair was the best and most cost-effective approach considering the financial and existing property and Infrastructure limitations. When finished, we shall have a bridge that should last us between 20 and 30 years at a cost that will NOT require additional increase in debt. This task had 3 parts and I graded each part separately. 3a = 4, 3b = 3 & 3 c = 4, for a task composite of 3.7. The only negatives I note have to do with a clear, crisp statement of funding source(s) – amounts and milestone dates on a spreadsheet format located on the city's WEB Page where the whole world could track this project and any major project for that matter.

4. Canal water Quality Projects - These Canal Improvement Projects are a prime example of the need for a maintained, up-to-date, on-line data base of Marco's major projects along with a chronological list of sub events associated with each project so that the public and council could reference this data on the city's WEB site 24/7 from project's inception to completion. This would enable ALL of US to ascertain a project's current, archived and projected status/milestones in a single place. Ultimately this would reduce the public's interaction with city staff, while improving transparency of project information for ALL interested parties.

This information could be maintained on an EXCEL spread sheet format with technical oversite of the designated responsible project manager. Data entry and WEB page maintenance could be performed by a lower-level staffer familiar with spreadsheet capabilities. The project manager need simple red-line a project's existing status template and pass this information to the staffer for project status update in the (EXCEL) spreadsheet.

Specific Canal Projects that are difficult to track:

- 1- Canal Flow improvement at dead-end canal points (3).
- 2- Improve level of O2 in canal waterways – Prototype (?)
- 3- MS4/_ Proposed Dredging of specific / all Marco Canal Waterways. Estimated at \$6M/year over ? years.

These projects have the following common characteristics:

- 1- Costs, Cost/year.
- 2- Type of project (i.e. prototype/pilot/extended complete project).
- 3- Est./actual date milestone status (Start, Duration, End date)
- 4- Project quantifiable "Success" criteria.
- 5- P.O.C.s with phone and email contact info.
- 6- Source of budget funds (per year), Grants etc. with links to details.

These types of projects are somewhat difficult to monitor, but any 6Σ industrial effort would have this information readily available for management oversite, stake holder and GRANT Review.

Process – Staff direction and control

By and large, your various department and their supporting staff perform an exemplary job in no small part to your Executive and Administrative experience and oversite.

There are some exceptions:

- 1- Issues with invalid/non-existing CLUZA certificates (for example in Old Marco and in general, city wide). This has been an on-going problem leading to unending meetings and discussions which can be attributed to a perpetual non-enforcement of our codes requiring our Island Commercial operations to maintain Up-To-Date CLUZA certificates. The city's CURRENT APPROACH - DO NOTHING UNLESS SOMEONE COMPLAINS or THE COMMERCIAL ESTABLISHMENT IS SOLD OFF OR CHANGES USE. This approach is unworkable and unacceptable. It only perpetuates and already bad situation that only encouraged bad behaviors such as unallowed USES, Parking issues and other unforeseen problems that could be controlled and avoided.
- 2- DENSITY – City staff seems to have a new paradigm for measuring and controlling city DENSITY and intensity using the FLUM, Zoning USES and the 2040 COMP plan's concept of the "current available island DENSITY (22,750 Density Units)". City staff "does NOT support a detailed documentation of DENSITY (on a per property basis). "WE DO NOT RETIRE DENSITY AND WE DO NOT MAINTAIN A DATABASE OF RETIRED DENSITY".

This is something new over the last 7 years or so. Previous city councils and COMP plans expressed a strong desire to REDUCE DENSITY (and Intensity). City staff doesn't seem to agree. I thought Council sets Policy. The city Manager implements this policy through his staff. That makes you the boss.

- 3- Affordable/Workforce Housing - Some staff are proposing Rezoning and / or changes to our Allowable USES and well as changes to our LDC related to Architectural Overlays to facilitate Affordable/Workforce Housing. When questioned by some councilors asking for quantifiable city liability regarding number of Affordable units required by the State and how many units these Zoning, USES and Overlay changes would produce, the response is "I don't know or I don't have that information or Marco doesn't have much actual property that could readily be converted to MIXED USE and designated for these affordable housing types". Meanwhile staff is giving local news reporters interviews stating specific numeric details quantifying how many Affordable Housing units could be made available (assuming with ZONING and USE changes).

Council is now being presented with Changes in zoning to some Overlay districts with a (conditional) change to a MIXED USE to facilitate Affordable/Workforce Housing with increased DENSITY and the accompanying increased INTENSITY, but not to worry, these “poor” workforce folks will probably not own autos!

- 4- Master Plans – Over the last 10 years, I've noted a proliferation of consultant Master Plans that seem to be conflicting with the Goals and Policies of our COMP Plans. The implied and sometimes stated rationale is “the public must accept these Master Plans because, after all they have been formulated by experienced, expert consultants that are better positioned to know what Marco citizens want and need. OH, and by the way, what is the process for soliciting the Marco Island citizen's biased input on these Master Plans. Is it straight forward, easy for the residents to express themselves? Is the city staff, consultants and council allowing the public to vote on these Master Plan expenditures prior to addition financial commitment?