

TIP SHEETS *for* ELECTED OFFICIALS

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ISSUE I

How To Evaluate An Executive Administrator

Whether it's a City Manager, a School Superintendent or a Community College President, Executive Administrators should be evaluated to improve their performance, but to also hold them accountable for achieving specific goals. Increasingly, contracts with executives now require evaluations. *This is a primary responsibility for most elected officials.*

There are great guidelines for this process available from:

- International City/County Management Association (ICMA)
- California School Board Association (CSBA)
- Community College League of California.

This Report is based primarily around their recommendations.



BEFORE YOU BEGIN:

To be fair, any evaluation should be based on criteria you have already communicated to the Administrator. That criteria should include:

- Progress toward district or city goals – usually taken from any strategic planning or other long-term plans
- Personal & professional qualities (some suggestions listed below)
- Decide on the process – evaluations can include informal or facilitated discussions, interviews, survey forms and other tools
- Decide who should conduct and participate in the evaluation. Will all the board/council participate or will you create a committee? Will you invite other executive staff to participate? Other stakeholders such as city residents, students, faculty, staff?
- An evaluation Consultant or Facilitator may be helpful to your elected body, especially if there are several new or inexperienced policymakers
- Decide whether to share your evaluation results in a “closed session” or in a public setting
- Remember that sharing at least some results of the evaluation with your stakeholders promotes transparency and in some cases may be required by state law
- Consider asking your Administrator to submit an “Evaluation Packet” to your governing body that includes a progress report, self-evaluation and review of actions since their last evaluation

Evaluative Criteria

While policymakers should mold their criteria to reflect the specific needs of their cities and districts, these are some of the core areas for effective management:

- 1. Staff Effectiveness:** Does the Administrator manage their staff in an efficient and effective way?
- 2. Performance Measurement/management & Quality Assurance:** Does the Administrator maintain a high level of quality in staff work, procedures, and service delivery? Use specific criteria you have already agreed upon. Don't rely on your "impressions" alone.
- 3. Initiative & Risk Taking:** Does the Administrator always pursue the status quo or "how we've always done things?" Does the Administrator remove stumbling blocks that delay progress toward goals and objectives?
- 4. Vision:** Does the Administrator have a clear idea where to guide the organization towards the future, and can they clearly convey that vision to others?
- 5. Creativity & Innovation:** Does the Administrator develop new ideas as well as apply existing and effective ideas and practices to new situations?
- 6. Diversity:** Does the Administrator value the differences among individuals and foster these values throughout the organization and the community? How diverse is your district or city's staff?
- 7. Budgeting:** Has the Administrator developed an efficient system to identify budget priorities? Does the Administrator clearly understand your budget challenges and offer realistic solutions?
- 8. Human Resources Management:** Does the Administrator know whether procedures for hiring, promoting and disciplining staff are fair, legal and current with state laws?
- 9. Strategic Planning:** Does the Administrator have a clear, long-term vision for the district or city – or has the Administrator worked closely with policymakers to create and shape a vision into a workable plan?
- 10. Community Engagement:** Does the Administrator clearly support policies that serve the best interests of the community?
- 11. Interpersonal Communication:** Does the Administrator show respect for others and what kind of "culture of respect" have they fostered in the office?
- 12. Communications & Media Relations:** Has the Administrator created an effective communications plan that engages all your most important audiences and stakeholders?
- 13. Integrity:** Does the Administrator demonstrate fairness and ethical awareness in relationships?

THE BOTTOM LINE

Be coaches, not judges. If the final report has a constructive, positive, non-vindictive tone, and spells out the Executive's accomplishments and contributions to the organization, the Administrator will more likely be inspired to do a better job, knowing their efforts are being recognized and appreciated.

This Tip Sheet is designed as a simple tool to help policymakers get started with this process.

The Latino Policy Center strongly recommends further study of these resources:

THE INTERNATIONAL CITY / COUNTY MANAGEMENT ASSOCIATION EVALUATIONS HANDBOOK:
http://icma.org/en/icma/career_network/career_resources/manager_evaluations_handbook

KEY POINTS RELATING TO SUPERINTENDENT EVALUATION - CSBA
http://www.csba.org/GovernanceAndPolicyResources/~media/CSBA/Files/GovernanceResources/EffectiveGovernance/2014_02_KeyPoints_SuperintendentEvaluation.ashx

ASSESSING THE PERFORMANCE OF THE CHIEF EXECUTIVE - CCLC
<http://www.ccleague.org/files/public/AssessingCEO.pdf>

CITY MANGER PERFORMANCE EVALUATION – CA LEAGUE OF CITIES – THIS IS AN ACTUAL EVALUATION FORM
<http://www.cacities.org/Resources-Documents/Member-Engagement/Professional-Departments/City-Attorneys/Sample-Evaluation-Forms/General-Examples/City-Manager-Evaluation>