

2025-55E

# City Auditor

# Stephen Mhere

KEY DOMAIN	ACHIEVEMENTS IN THE KEY DOMAIN
<b>Governance and Compliance</b>	<p><b>Objective:</b> Ensure that city departments comply with laws, regulations, and policies.</p> <p><b>Activities:</b></p> <ul style="list-style-type: none"> <li>○ Evaluate adherence to federal, state, and local laws (internal audits).</li> <li>○ Assess compliance with internal policies and procedures (internal audits).</li> <li>○ Monitor ethical standards and prevent conflicts of interest (Ethics training for elected officials, City employees, and other independent board members).</li> </ul> <p><b>Outcome:</b> Improved accountability and trust in government operations.</p>
<b>Risk Management</b>	<p><b>Objective:</b> Identify and mitigate risks that could impact city operations or objectives.</p> <p><b>Activities:</b></p> <ul style="list-style-type: none"> <li>○ Conduct risk assessments to prioritize high risk areas (FY 2025 Audit Agenda).</li> <li>○ Make recommendations to help reduce financial, operational, and reputational risks (internal audits).</li> <li>○ Endeavor to maximize audit coverage (see Bullet B below).</li> <li>○ Verify recommendations are implemented to provide reasonable assurance that adequate internal controls are in place and functioning effectively (see Bullet B below).</li> </ul> <p><b>Outcome:</b> Reduced vulnerabilities and enhanced preparedness for challenges.</p>
<b>Efficiency and Effectiveness of Operations</b>	<p><b>Objective:</b> Improve the performance and cost-effectiveness of city programs and services.</p> <p><b>Activities:</b></p> <ul style="list-style-type: none"> <li>○ Analyze workflows, resource allocation, and operational processes (internal audits).</li> <li>○ Identify redundancies, inefficiencies, or wasteful practices (internal audits).</li> <li>○ Recommendations to enhance service delivery and resource use (internal audits).</li> <li>○ Staff Training (ALGA peer review training for IT Audit Manager (see Bullet A below) &amp; CIA certification training for staff auditor).</li> <li>○ Departmental reorganization (see Bullet C below).</li> </ul> <p><b>Outcome:</b> Optimized operations that better serve the public.</p>
<b>Financial Stewardship</b>	<p><b>Objective:</b> Safeguard public funds and ensure fiscal responsibility.</p> <p><b>Activities:</b></p> <ul style="list-style-type: none"> <li>○ Audit financial transactions for accuracy, transparency, and accountability (selection of external auditor for the Annual Comprehensive Financial Report).</li> <li>○ Verify proper management of grants, contracts, and procurement processes (internal audits).</li> <li>○ Prevent and detect fraud, waste, and abuse (fraud hotline operations).</li> </ul> <p><b>Outcome:</b> Enhanced public confidence in the city's financial management.</p>

## **A. PEER REVIEW TRAINING**

City government internal audit departments typically save a substantial amount by participating in the **peer review process** of the **Association of Local Government Auditors (ALGA)** instead of hiring private audit firms. On average, **ALGA peer reviews** cost around **\$5,000 – \$7,000**, which includes expenses for travel, lodging, and a nominal administrative fee. In contrast, private audit firms often charge anywhere between **\$20,000** and **\$30,000** for similar external peer reviews, depending on the firm's size and the complexity of the audit function. Thus, by opting for the ALGA peer review, City Auditor's Office saves approximately **\$15,000 to \$23,000**, receives a high standard of review, and remains in compliance with professional audit standards.

## **B. INTERNAL AUDIT PERFORMANCE METRICS**

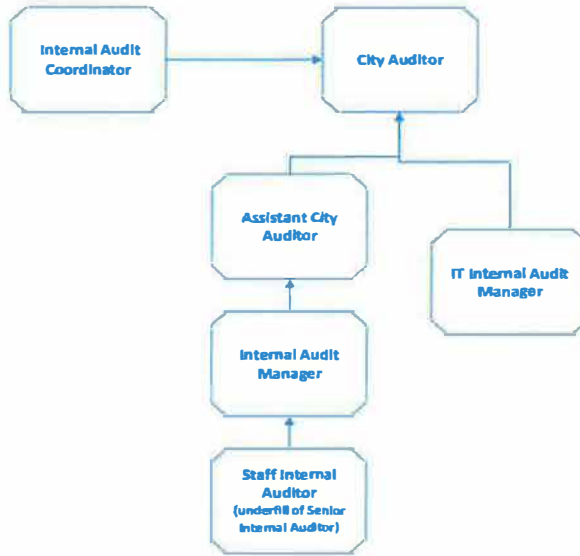
The two main performance measures for an internal audit department are:

1. **Audit Coverage and Completion Rate:** This measures the extent to which the department achieves its annual audit plan. It reflects the efficiency and effectiveness in meeting planned objectives, addressing high-risk areas, and adhering to timelines. A high completion rate indicates strong planning and resource management.
2. **Implementation of Recommendations:** This tracks the percentage of audit recommendations that are accepted and implemented by management within a specified time. A high implementation rate demonstrates the value and impact of the audit department's work in driving organizational improvement and addressing identified risks. Tracks the percentage of audit recommendations accepted and implemented by management, reflecting the department's effectiveness in delivering actionable insights and driving organizational improvements. All our recommendations have been implemented, are being implemented, or there are agreed management plans to implement them.

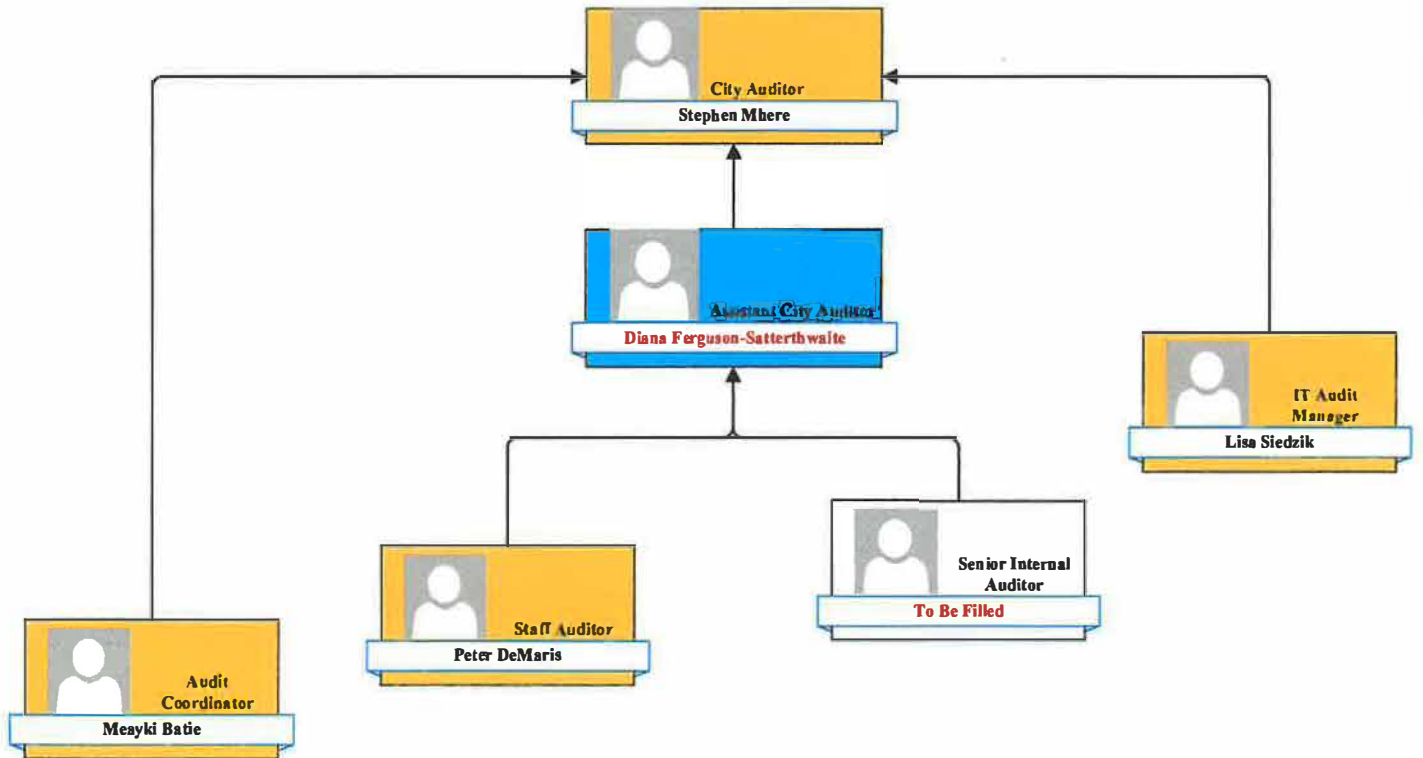
## **C. REORGANIZATION OF CITY AUDITOR'S OFFICE**

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**CITY OF GAINESVILLE - OFFICE OF THE CITY AUDITOR**  
**\* 2024 Organizational Chart \***



**CITY OF GAINESVILLE - OFFICE OF THE CITY AUDITOR**  
**\* 2025 PROPOSED ORG CHART \***





# Charter Officer Annual Performance Evaluation Form

Where  
Self-Evaluation

## Introduction:

The City Commission is responsible for conducting Charter Officer annual evaluations ensuring the Charter contributes to the achievement of the City's mission, vision and goals. Charter Officer performance evaluations shall be conducted after the conclusion of each fiscal year.

The purpose of the Charter Officer evaluation is to provide timely, clear and focused input to the Charter about how well he or she is performing in the key performance areas identified as most critical by the City Commission in achieving the City of Gainesville's strategic objectives.

The Charter Officer should be evaluated using criteria established by the Commission, aligning with established core competencies, review rating scale criteria and salary adjustment schedules as determined by Human Resources. Human Resources will notify the Commission at least one month in advance of performance evaluation due dates. Annual salary increases will be based on the Charter Officer's performance of established objectives in the prior fiscal year. Any annual awards are made based on market considerations and according to budgetary or fiscal constraints.

## Commission Instructions:

Evaluate the Charter Officer's performance for each area of accountability using the rating scale outlined below. Consider all criteria together when forming an impression about the Charter Officer's performance. Add comments you believe provide context to your rating or that would be helpful to the Charter Officer.

Performance Descriptors and Rating Scale		
5	Superior	Work performance consistently exceeds all performance expectations and displays a consistent level of exceptional performance. This is consistent, exceptional performance.
4	Exemplary	Work performance consistently achieves all performance expectations and key elements of performance consistently are carried out in an exceptional manner or sustained periods. This is consistent, outstanding performance.
3	Meets Expectations	Work performance consistently achieves all performance expectations for this factor.
2	Needs Improvement	Work performance on one or more elements is less than expected and requires some improvements to fully meet performance standards.
1	Did Not Meet Expectations	Work performance within this factor is unacceptable. Performance did not meet expected performance standards.

**Ratings 2 or below should include comments and if applicable provide specific suggestions for performance improvement.**

## Charter Officer Instructions and Next Steps:

- Using the above Rating Scale, the Charter Officer will self-evaluate and rate his or her performance. The Charter Officer should also attach his or her **Accomplishments List or Report** to the form.
- Charter Officer to submit completed self-evaluation and accomplishments report to Human Resources.
- Charter Officer to schedule individual evaluation discussion meetings with each Commission member to discuss self-evaluation and list of accomplishments. Charters should also be prepared to discuss objectives for next fiscal year.
- After reviewing the Charter Officer self-evaluation and accomplishments report with the Charter Officer, each Commission member will provide an evaluation rating, using the above Rating Scale.
- Following Commission and Charter performance evaluation discussion, completed performance evaluations are returned to Human Resources.
- Human Resources will compile and aggregate all Charter Officer evaluation ratings, coordinate and present for discussion during a publicly noticed Commission meeting. Note: Salary increases are budgeted in a personal services contingency account and recommended salary increases will be processed within established payroll processing timelines.

**Fiscal Year:**

**Evaluator:**



## Charter Officer Annual Performance Evaluation Form

Charter Officer: Stephen Mhere

Title: City Auditor

**\*Overall Support of City Commission Goals and Objectives.** Demonstrates an understanding of and supports the City's philosophy (vision, mission, values); actively pursues an understanding of organizational goals and objectives and how these relate to the Charter Officers' job and department.

**\*Charter to attach Accomplishments Report for Evaluation Period**

Commission Member: Check performance rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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**Charter Officer Comments:** Enterprise risk assessment and IT risk assessment. Audit agenda for FY 2025 that covers both General Government and IT. Training for one of the audit managers for a qualification to perform peer reviews. This enables reciprocity within the ALGA community, serving the City Auditor a considerable amount of money (approximately \$15,000 to \$23,000) when peer review is required. Achieved 100% management concurrence on audit recommendations (management agreement to implement).

### Competencies:

**1. Business Acumen.** Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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**Charter Officer Comments:** **Strategic Thinking:** Ability to align audit objectives with the city's goals, prioritize high-risk areas, and provide actionable recommendations to enhance operational efficiency. **Financial Expertise:** Strong understanding of budgeting, financial planning, and cost-saving strategies to ensure effective resource utilization and fiscal accountability. **Regulatory Knowledge:** Deep familiarity with governmental policies, regulations, and compliance standards to assess and enhance adherence effectively. **Ethical Leadership:** Commitment to integrity and transparency in safeguarding public trust and ensuring accountability.



## Charter Officer Annual Performance Evaluation Form

- 2. Communication and Building Relationships.** Communicates and listens effectively, open to receiving and giving constructive feedback, promotes frank and open discussions on issues. Cultivates a network of relationships both internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments: **Effective communication:** Listening effectively and being open to receiving and giving constructive feedback. I promote frank and open discussions on issues, including audit issues with management. I have introduced an approach to disseminate audit findings where each finding is discussed in detail with management at the moment of discovery instead of waiting for exit conference. This promotes collaboration and removes barriers across departmental lines, builds credibility for the City. **Relationships:** Communication with GRU is an example of my desire to build or keep our relationships with stakeholders strong (splitting of the Fleet audit; formal communication of recommendations needing follow-up; coordination of ethics training for elected officials and members of various boards, including invitation to GRUA board members). Reaching out to accounting professors at UF is another example of desire to build relationships with Gainesville community.

- 3. Fiscal Management.** Prepares a balanced budget to provide services at a level directed by the Commission, ensuring actions and decisions reflect an appropriate level of responsibility for financial planning and accountability.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments: **Austerity Measures:** As City Auditor, I reduced the budget by introducing a new audit management software, temporarily shifting to manual processes to facilitate the transition. This initiative saved approximately \$33,000 over three years. Additionally, I reorganized the department during staff turnover, achieving \$27,000 in savings. These efforts demonstrated financial accountability and strategic planning.





## Charter Officer Annual Performance Evaluation Form

**4. Leading and Supervision.** Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check rating

1 ☐

2 ☐

3 ☐

4 ☐

5 ☐

N/A ☐

Commission Member Comments:

Charter Officer: Check self-evaluation rating

1 ☐

2 ☐

3 ☐

4 ☐

5 ☒

N/A ☐

Charter Officer Comments: To develop and maximize employee performance while fostering high standards aligned with the department's vision and goals, I empower staff to innovate within their objectives and maintain an open-door policy for guidance and idea-sharing. I critically evaluate ideas by playing devil's advocate, encouraging robust analysis and well-rounded solutions. To ensure commitment, I engage all staff members in discussions before adopting any policy positions, fostering collaboration and buy-in. This approach promotes a culture of innovation, inclusivity, and accountability, driving both individual and departmental success.

Charter Officer Signature: \_\_\_\_\_

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

Commission Member Signature: \_\_\_\_\_

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

Return fully completed Charter Officer Performance Evaluation form to Human Resources Director, Box 20





## Charter Officer Annual Performance Evaluation Form

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### Commission Instructions:

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### Charter Officer Instructions and Next Steps:

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## Charter Officer Annual Performance Evaluation Form

<b>Fiscal Year: 2024</b>	<b>Evaluator: Ed Book</b>
<b>Charter Officer: Steven Mhere</b>	<b>Title: Auditor</b>

**\*Overall Support of City Commission Goals and Objectives.** Demonstrates an understanding of and supports the City's philosophy (vision, mission, values); actively pursues an understanding of organizational goals and objectives and how these relate to the Charter Officers' job and department.

**\*Charter to attach Accomplishments Report for Evaluation Period**

<b>Commission Member: Check performance rating</b>	<b>1</b> <input type="checkbox"/>	<b>2</b> <input type="checkbox"/>	<b>3</b> <input checked="" type="checkbox"/>	<b>4</b> <input type="checkbox"/>	<b>5</b> <input type="checkbox"/>	<b>N/A</b> <input type="checkbox"/>
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Commission Member Comments:

Understands that Auditor effectiveness ties into comprehensive City efficiency. Understands inter-organizational relationships & the manner in which all areas of the City must operate in fiscally responsible ways while maintaining effectiveness & efficiency.

Also discussed Goals / Objectives he has prepared. Strong relationships with the external community is a primary goal of the City Auditor for 2024-25, interesting but innovative for the office. Wishes to partner / develop relationship with UF/SF auditing areas & may then have additional resources, staff, students to assist with the office.

For his short tenure here as the newest charter officer, a very good hire.

<b>Charter Officer: Check self-evaluation rating</b>	<b>1</b> <input type="checkbox"/>	<b>2</b> <input type="checkbox"/>	<b>3</b> <input type="checkbox"/>	<b>4</b> <input type="checkbox"/>	<b>5</b> <input checked="" type="checkbox"/>	<b>N/A</b> <input type="checkbox"/>
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Charter Officer Comments: Performed enterprise and IT risk assessments to formulate the Audit agenda for FY25. Sent one of the audit managers for training to perform peer reviews. This enables reciprocity within the ALQA community, saving the city Auditor a considerable amount of money (approx. \$15-23,000) when peer review is required. Achieved 100% management concurrence on audit recommendations (management agreement to implement).

### Competencies:

**1. Business Acumen.** Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

<b>Commission Member: Check competency rating</b>	<b>1</b> <input type="checkbox"/>	<b>2</b> <input type="checkbox"/>	<b>3</b> <input type="checkbox"/>	<b>4</b> <input checked="" type="checkbox"/>	<b>5</b> <input type="checkbox"/>	<b>N/A</b> <input type="checkbox"/>
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Commission Member Comments:

Knows that proactive business practices, accountability, & tools that improve financial restraint are critical to solid City operations. Possesses financial expertise & the ability to monitor other areas in a collaborative way.

Related to business acumen & capabilities within the field. Possesses best practice credentials & certifications including but not limited to CIA & CISA. Engages in regular professional development via webinars & networking. Understands that regular training will ensure staying



## Charter Officer Annual Performance Evaluation Form

current with trends & audit practices. Across staff, expertise is in all critical areas with appropriate credentials.

Recognizes that external auditing functions – perhaps for GRU – also may ensure additional expertise in the office & funding though GRU is likely not to use out of privacy & conflict concerns.

Provided strategic plan to the Audit Committee & Commission & planning for anticipated & unanticipated planning needs is excellent.

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments: STRATEGIC THINKING: Ability to align audit objectives with city goals, prioritize high-risk areas, and provide actionable recommendations to enhance operational efficiency. FINANCIAL EXPERTISE: Strong understanding of budgeting, financial planning, and cost-saving strategies to ensure effective resource utilization and fiscal accountability. REGULATORY KNOWLEDGE: Deep familiarity with governmental policies, regulations, and compliance standards to assess and enhance adherence effectively.

ETHICAL LEADERSHIP: Commitment to integrity and transparency in safeguarding public trust and ensuring accountability.





## Charter Officer Annual Performance Evaluation Form

**2. Communication and Building Relationships.** Communicates and listens effectively, open to receiving and giving constructive feedback, promotes frank and open discussions on issues. Cultivates a network of relationships both internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

<b>Commission Member: Check competency rating</b>	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Professional, measured, regular communication within the Auditor's office & across City Charter & Divisions. No concerns noted. Regular attendance at CC & other relevant meetings & updates when needed. Has strong work ethic (as noted by long hours he works).

Prepares notes in advance for when we meet & sticks to both an efficient time frame & that agenda. Focuses appropriately in his communications on the key aspects of the audit – timeframe, who is involved, potential outcomes & recommendations.

Internally has impromptu "stand up" meetings to inform & as noted elsewhere, his door is open. Welcomes innovative approaches or conflicting ideas. Externally has reached out to UF auditing academic areas – the first auditor known to do so according to a UF professor – to strengthen relationships & potentially benefit with resources & staff.

<b>Charter Officer: Check self-evaluation rating</b>	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments: **EFFECTIVE COMMUNICATION:** Listening effectively, and being open to receiving and giving constructive feedback. I promote frank & open discussions on issues to mgt. I introduced an approach to disseminating audit findings where each finding is discussed to mgt at the moment of discovery instead of waiting for the exit conference. This promotes collaboration and removes barriers across departmental lines, building credibility. **RELATIONSHIPS:** Communication to GRU is an ex. of my desire to build or keep relationships w/ stakeholders strong (Fleet Audit; communication to GRU about follow up of their recommendations; ethics training coordination; inviting other board members, inc GRUA). Reaching out to accounting professors at UF, etc.).

**3. Fiscal Management.** Prepares a balanced budget to provide services at a level directed by the Commission, ensuring actions and decisions reflect an appropriate level of responsibility for financial planning and accountability.

<b>Commission Member: Check competency rating</b>	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

In a second consecutive difficult budget year, balanced budget & reduced by 2.3%, approx reduction of \$40,000 in a small office. I note this is the Auditor's first fiscal cycle as he was hired on Feb 2024.

From a budgeting standpoint, internally promoted to the Asst City Auditor, both created upward mobility & resulted in cost savings. Hiring another new staff member into that person's position will incur additional small cost savings shortly.



## Charter Officer Annual Performance Evaluation Form

As an example of reviewing operating costs, negotiated with the "hotline" vendor to keep the same annual cost as the preceding year. A small amount but noteworthy of the Auditor's recognition of fiscal restraint.

This office will need to identify additional efficiencies in coming years potentially by identifying processes that automate metrics or assist in identifying audit needs.

Charter Officer: Check self-evaluation rating

1 ☐

2 ☐

3 ☐

4 ☒

5 ☐

N/A ☐

Charter Officer Comments: AUSTRIAN MEASURES: As City Auditor, I reduced the budget by introducing a new audit software, temporarily shifting to manual processes to facilitate the transition. This initiative saved approx. \$33,000 over three years. Additionally, I reorganized the department during staff turnover, achieving \$27,000 in savings. These efforts demonstrated financial accountability and strategic planning.



## Charter Officer Annual Performance Evaluation Form

**4. Leading and Supervision.** Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check rating

1 ☐

2 ☐

3 ☐

4 ☒

5 ☐

N/A ☐

Commission Member Comments:

Took over from Interim City auditor /Assistant City auditor last year. Has 3 direct reports all with extensive experience & 2 other staff support positions.

AS noted before, has good regular communication with weekly 1 on 1's at a minimum & an open door policy. Has handled supervising & leading the office for 10 months.

For audits, has developed a process where his office sits down with the managers over audited areas before the audit is complete. This allows the managers & audit staff to ensure a better product (also a Business Acumen aspect) & is a leading communication tool.

Is focused & competent. Encourages feedback & works well within his office. A very good hire for the City.

Future goal: Looking to improve on audit processes to refine many audits into smaller auditable units. This will improve timeliness, speed implementation of recommended changes, & promote more effective auditing. This also aids in relationships with other managers.

Charter Officer: Check self-evaluation rating

1 ☐

2 ☐

3 ☐

4 ☐

5 ☒

N/A ☐

Charter Officer Comments: To develop & maximize employee performance while fostering high standards aligned with the department's vision and goals, I empower staff to innovate within their objectives and maintain an open-door policy for guidance and idea-sharing. I critically evaluate ideas by playing devil's advocate, encouraging robust analysis and well-rounded solutions. To ensure commitment, I engage all staff in discussions before adopting a policy, fostering collaboration and buy-in. This approach promotes inclusivity, innovation, and accountability and drives success.

Charter Officer Signature: 

Date: 12.20.2024

Commission Member Signature: 

Date: 12/19/24

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# Charter Officer Annual Performance Evaluation Form

Mhere/Chestnut

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**Fiscal Year:**

**Evaluator:**





## Charter Officer Annual Performance Evaluation Form

Charter Officer: Stephen Mhere

Title: City Auditor

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**\*Charter to attach Accomplishments Report for Evaluation Period**

Commission Member: Check performance rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

*Very forward thinking, planning for benefits to the City*

Charter Officer: Check self-evaluation rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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**Charter Officer Comments:** Enterprise risk assessment and IT risk assessment. Audit agenda for FY 2025 that covers both General Government and IT. Training for one of the audit managers for a qualification to perform peer reviews. This enables reciprocity within the ALGA community, serving the City Auditor a considerable amount of money (approximately \$15,000 to \$23,000) when peer review is required. Achieved 100% management concurrence on audit recommendations (management agreement to implement).

### Competencies:

**1. Business Acumen.** Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
----------------------------	----------------------------	----------------------------	---------------------------------------	----------------------------	------------------------------

Commission Member Comments:

*Demonstrated a good command of auditing skills*

Charter Officer: Check self-evaluation rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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**Charter Officer Comments:** **Strategic Thinking:** Ability to align audit objectives with the city's goals, prioritize high-risk areas, and provide actionable recommendations to enhance operational efficiency. **Financial Expertise:** Strong understanding of budgeting, financial planning, and cost-saving strategies to ensure effective resource utilization and fiscal accountability. **Regulatory Knowledge:** Deep familiarity with governmental policies, regulations, and compliance standards to assess and enhance adherence effectively. **Ethical Leadership:** Commitment to integrity and transparency in safeguarding public trust and ensuring accountability.



## Charter Officer Annual Performance Evaluation Form

- 2. Communication and Building Relationships.** Communicates and listens effectively, open to receiving and giving constructive feedback, promotes frank and open discussions on issues. Cultivates a network of relationships both internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

**Commission Member: Check competency rating**    1 ☐    2 ☐    3 ☐    4 ☒    5 ☐    N/A ☐

Commission Member Comments:

*Worked well in building communication since joining the City.*

**Charter Officer: Check self-evaluation rating**    1 ☐    2 ☐    3 ☐    4 ☐    5 ☒    N/A ☐

**Charter Officer Comments:** **Effective communication:** Listening effectively and being open to receiving and giving constructive feedback. I promote frank and open discussions on issues, including audit issues with management. I have introduced an approach to disseminate audit findings where each finding is discussed in detail with management at the moment of discovery instead of waiting for exit conference. This promotes collaboration and removes barriers across departmental lines, builds credibility for the City. **Relationships:** Communication with GRU is an example of my desire to build or keep our relationships with stakeholders strong (splitting of the Fleet audit; formal communication of recommendations needing follow-up; coordination of ethics training for elected officials and members of various boards, including invitation to GRUA board members). Reaching out to accounting professors at UF is another example of desire to build relationships with Gainesville community.

- 3. Fiscal Management.** Prepares a balanced budget to provide services at a level directed by the Commission, ensuring actions and decisions reflect an appropriate level of responsibility for financial planning and accountability.

**Commission Member: Check competency rating**    1 ☐    2 ☐    3 ☐    4 ☒    5 ☐    N/A ☐

Commission Member Comments:

*Inherited a good financial foundation from previous auditor. Looking for ways to benefit from the City.*

**Charter Officer: Check self-evaluation rating**    1 ☐    2 ☐    3 ☐    4 ☒    5 ☐    N/A ☐

**Charter Officer Comments:** **Austerity Measures:** As City Auditor, I reduced the budget by introducing a new audit management software, temporarily shifting to manual processes to facilitate the transition. This initiative saved approximately \$33,000 over three years. Additionally, I reorganized the department during staff turnover, achieving \$27,000 in savings. These efforts demonstrated financial accountability and strategic planning.



## Charter Officer Annual Performance Evaluation Form

**4. Leading and Supervision.** Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
---------------------------------	----------------------------	----------------------------	----------------------------	----------------------------	---------------------------------------	------------------------------

Commission Member Comments:

*Demonstrated good leadership skills.*

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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**Charter Officer Comments:** To develop and maximize employee performance while fostering high standards aligned with the department's vision and goals, I empower staff to innovate within their objectives and maintain an open-door policy for guidance and idea-sharing. I critically evaluate ideas by playing devil's advocate, encouraging robust analysis and well-rounded solutions. To ensure commitment, I engage all staff members in discussions before adopting any policy positions, fostering collaboration and buy-in. This approach promotes a culture of innovation, inclusivity, and accountability, driving both individual and departmental success.

Charter Officer Signature: \_\_\_\_\_

Date: 12.03.2024

Commission Member Signature: \_\_\_\_\_

Date: 12/3/24

Return fully completed Charter Officer Performance Evaluation form to Human Resources Director, Box 20



## Charter Officer Annual Performance Evaluation Form

Mhere/Duncan-Walker

### Introduction:

The City Commission is responsible for conducting Charter Officer annual evaluations ensuring the Charter contributes to the achievement of the City's mission, vision and goals. Charter Officer performance evaluations shall be conducted after the conclusion of each fiscal year.

The purpose of the Charter Officer evaluation is to provide timely, clear and focused input to the Charter about how well he or she is performing in the key performance areas identified as most critical by the City Commission in achieving the City of Gainesville's strategic objectives.

The Charter Officer should be evaluated using criteria established by the Commission, aligning with established core competencies, review rating scale criteria and salary adjustment schedules as determined by Human Resources. Human Resources will notify the Commission at least one month in advance of performance evaluation due dates. Annual salary increases will be based on the Charter Officer's performance of established objectives in the prior fiscal year. Any annual awards are made based on market considerations and according to budgetary or fiscal constraints.

### Commission Instructions:

Evaluate the Charter Officer's performance for each area of accountability using the rating scale outlined below. Consider all criteria together when forming an impression about the Charter Officer's performance. Add comments you believe provide context to your rating or that would be helpful to the Charter Officer.

Performance Descriptors and Rating Scale		
5	Superior	Work performance consistently exceeds all performance expectations and displays a consistent level of exceptional performance. This is consistent, exceptional performance.
4	Exemplary	Work performance consistently achieves all performance expectations and key elements of performance consistently are carried out in an exceptional manner or sustained periods. This is consistent, outstanding performance.
3	Meets Expectations	Work performance consistently achieves all performance expectations for this factor.
2	Needs Improvement	Work performance on one or more elements is less than expected and requires some improvements to fully meet performance standards.
1	Did Not Meet Expectations	Work performance within this factor is unacceptable. Performance did not meet expected performance standards.

Ratings 2 or below should include comments and if applicable provide specific suggestions for performance improvement.

### Charter Officer Instructions and Next Steps:

- Using the above Rating Scale, the Charter Officer will self-evaluate and rate his or her performance. The Charter Officer should also attach his or her **Accomplishments List or Report** to the form.
- Charter Officer to submit completed self-evaluation and accomplishments report to Human Resources.
- Charter Officer to schedule individual evaluation discussion meetings with each Commission member to discuss self-evaluation and list of accomplishments. Charters should also be prepared to discuss objectives for next fiscal year.
- After reviewing the Charter Officer self-evaluation and accomplishments report with the Charter Officer, each Commission member will provide an evaluation rating, using the above Rating Scale.
- Following Commission and Charter performance evaluation discussion, completed performance evaluations are returned to Human Resources.
- Human Resources will compile and aggregate all Charter Officer evaluation ratings, coordinate and present for discussion during a publicly noticed Commission meeting. Note: Salary increases are budgeted in a personal services contingency account and recommended salary increases will be processed within established payroll processing timelines.



## Charter Officer Annual Performance Evaluation Form

Fiscal Year: 2023-2024	Evaluator: Commissioner Desmon Duncan-Walker
Charter Officer: Stephen Mhere	Title: City Auditor

**\*Overall Support of City Commission Goals and Objectives.** Demonstrates an understanding of and supports the City's philosophy (vision, mission, values); actively pursues an understanding of organizational goals and objectives and how these relate to the Charter Officers' job and department.

**\*Charter to attach Accomplishments Report for Evaluation Period**

Commission Member: Check performance rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
---	----------------------------	----------------------------	----------------------------	----------------------------	----------------------------	------------------------------

Charter Officer Comments:

### Competencies:

**1. Business Acumen.** Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



## Charter Officer Annual Performance Evaluation Form

- 2. Communication and Building Relationships.** Communicates and listens effectively, open to receiving and giving constructive feedback, promotes frank and open discussions on issues. Cultivates a network of relationships both internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

- 3. Fiscal Management.** Prepares a balanced budget to provide services at a level directed by the Commission, ensuring actions and decisions reflect an appropriate level of responsibility for financial planning and accountability.

Commission Member: Check competency rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Charter Officer: Check self-evaluation rating	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:





## Charter Officer Annual Performance Evaluation Form

**4. Leading and Supervision.** Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check rating

1 ☐

2 ☐

3 ☐

4 ☐

5 ☒

N/A ☐

Commission Member Comments:

Charter Officer: Check self-evaluation rating

1 ☐

2 ☐

3 ☐

4 ☐

5 ☐

N/A ☐

Charter Officer Comments:

Charter Officer Signature: 

Date: 01.13.2025

Commission Member Signature: Desmon Duncan-Walker

Date: 1/3/2025

Return fully completed Charter Officer Performance Evaluation form to Human Resources Director, Box 20



## City Auditor

### **Overall Support of City Commission Goals and Objectives**

5

As the newest of the City Charters, Mr. Mhere has done a great job of understanding the needs of the City and being flexible with how he approaches the job of City Auditor. His collaborative approach to the role is much needed and appreciated.

### **Business Acumen**

4

I've not yet seen Mr. Mhere through a full budget cycle, so it's still too early to see his overall business acumen. However, he has handled the shifting budgets and curveballs in the role well in his short time here.

### **Communication and Building Relationships**

4

The Auditors Office is always very communicative and supportive, and Mr. Mhere's fellow Charter officers seem to feel he has been a good, collaborative colleague during his term.

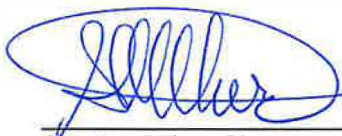
### **Fiscal Management**

4

It's still too early to tell how Mr. Mhere is on fiscal management as his time has been too short, but he has handled this well during his time.

### **Leading and Supervision**

4



Charter Officer Signature

01.13.2025

Date



## Charter Officer Annual Performance Evaluation Form

### Introduction:

The City Commission is responsible for conducting Charter Officer annual evaluations ensuring the Charter contributes to the achievement of the City's mission, vision and goals. Charter Officer performance evaluations shall be conducted after the conclusion of each fiscal year.

The purpose of the Charter Officer evaluation is to provide timely, clear and focused input to the Charter about how well he or she is performing in the key performance areas identified as most critical by the City Commission in achieving the City of Gainesville's strategic objectives.

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### Commission Instructions:

Evaluate the Charter Officer's performance for each area of accountability using the rating scale outlined below. Consider all criteria together when forming an impression about the Charter Officer's performance. Add comments you believe provide context to your rating or that would be helpful to the Charter Officer.

Performance Descriptors and Rating Scale		
5	Superior	Work performance consistently exceeds all performance expectations and displays a consistent level of exceptional performance. This is consistent, exceptional performance.
4	Exemplary	Work performance consistently achieves all performance expectations and key elements of performance consistently are carried out in an exceptional manner or sustained periods. This is consistent, outstanding performance.
3	Meets Expectations	Work performance consistently achieves all performance expectations for this factor.
2	Needs Improvement	Work performance on one or more elements is less than expected and requires some improvements to fully meet performance standards.
1	Did Not Meet Expectations	Work performance within this factor is unacceptable. Performance did not meet expected performance standards.

**Ratings 2 or below should include comments and if applicable provide specific suggestions for performance improvement.**

### Charter Officer Instructions and Next Steps:

- Using the above Rating Scale, the Charter Officer will self-evaluate and rate his or her performance. The Charter Officer should also attach his or her **Accomplishments List or Report** to the form.
- Charter Officer to submit completed self-evaluation and accomplishments report to Human Resources.
- Charter Officer to schedule individual evaluation discussion meetings with each Commission member to discuss self-evaluation and list of accomplishments. Charters should also be prepared to discuss objectives for next fiscal year.
- After reviewing the Charter Officer self-evaluation and accomplishments report with the Charter Officer, each Commission member will provide an evaluation rating, using the above Rating Scale.
- Following Commission and Charter performance evaluation discussion, completed performance evaluations are returned to Human Resources.
- Human Resources will compile and aggregate all Charter Officer evaluation ratings, coordinate and present for discussion during a publicly noticed Commission meeting. Note: Salary increases are budgeted in a personal services



## Charter Officer Annual Performance Evaluation Form

contingency account and recommended salary increases will be processed within established payroll processing timelines.

<b>Fiscal Year:</b>	<b>Evaluator: SACO</b>
<b>Charter Officer: Stephen Mhere</b>	<b>Title: Auditor</b>

**\*Overall Support of City Commission Goals and Objectives.** Demonstrates an understanding of and supports the City's philosophy (vision, mission, values); actively pursues an understanding of organizational goals and objectives and how these relate to the Charter Officers' job and department.

**\*Charter to attach Accomplishments Report for Evaluation Period**

<b>Commission Member: Check performance rating</b>	<b>1</b> <input type="checkbox"/>	<b>2</b> <input type="checkbox"/>	<b>3</b> <input type="checkbox"/>	<b>4</b> <input type="checkbox"/>	<b>5</b> <input checked="" type="checkbox"/>	<b>N/A</b> <input type="checkbox"/>
<b>Commission Member Comments:</b> <b>Jumped right into the thick of it and has kept the ball rolling. Is aware of long-term planning goals of various departments and how to balance it against the short term needs.</b>						
<b>Charter Officer: Check self-evaluation rating</b>	<b>1</b> <input type="checkbox"/>	<b>2</b> <input type="checkbox"/>	<b>3</b> <input type="checkbox"/>	<b>4</b> <input type="checkbox"/>	<b>5</b> <input type="checkbox"/>	<b>N/A</b> <input type="checkbox"/>
<b>Charter Officer Comments:</b>						

### Competencies:

<b>1. Business Acumen.</b> Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.						
<b>Commission Member: Check competency rating</b>	<b>1</b> <input type="checkbox"/>	<b>2</b> <input type="checkbox"/>	<b>3</b> <input type="checkbox"/>	<b>4</b> <input type="checkbox"/>	<b>5</b> <input checked="" type="checkbox"/>	<b>N/A</b> <input type="checkbox"/>
<b>Commission Member Comments:</b> <b>Is accustomed to government needs and shifting resources. Has remained up-to-date and keeps staff trained according to national standards.</b>						
<b>Charter Officer: Check self-evaluation rating</b>	<b>1</b> <input type="checkbox"/>	<b>2</b> <input type="checkbox"/>	<b>3</b> <input type="checkbox"/>	<b>4</b> <input type="checkbox"/>	<b>5</b> <input type="checkbox"/>	<b>N/A</b> <input type="checkbox"/>
<b>Charter Officer Comments:</b>						



## Charter Officer Annual Performance Evaluation Form

- 2. Communication and Building Relationships.** Communicates and listens effectively, open to receiving and giving constructive feedback, promotes frank and open discussions on issues. Cultivates a network of relationships both internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

<b>Commission Member: Check competency rating</b>	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Has been open and upfront about successes and limitations of his office. Has clearly let me know the needs to keep the office operating at a level sufficient for the city of Gainesville. Has built good working relationships within his own office and with other charters. Has attempted to work with GRU in good faith.

<b>Charter Officer: Check self-evaluation rating</b>	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

- 3. Fiscal Management.** Prepares a balanced budget to provide services at a level directed by the Commission, ensuring actions and decisions reflect an appropriate level of responsibility for financial planning and accountability.

<b>Commission Member: Check competency rating</b>	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Excellent sense of management for his own office and how to best maintain the talent needed. Has let us know what resources will be needed.

<b>Charter Officer: Check self-evaluation rating</b>	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:



## Charter Officer Annual Performance Evaluation Form

**4. Leading and Supervision.** Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check rating

1 ☐

2 ☐

3 ☐

4 ☐

5 ☒

N/A ☐

Commission Member Comments:

Hiring Stephen has been one of my best votes. He is sincere and dedicated to his job, his department, and the city. He has immersed himself in the strategic planning of the city and the individual goals of commissioners to help guide the audit plan and where we should strengthen our controls.

Charter Officer: Check self-evaluation rating

1 ☐

2 ☐

3 ☐

4 ☐

5 ☐

N/A ☐

Charter Officer Comments:

Charter Officer Signature: 

Date: 01.13.2025

Commission Member Signature: /s/ Reina Saco

Date: 12/31/24

Return fully completed Charter Officer Performance Evaluation form to Human Resources Director, Box 20



## Charter Officer Annual Performance Evaluation Form

2024 M. H. WARD

### **Introduction:**

The City Commission is responsible for conducting Charter Officer annual evaluations ensuring the Charter contributes to the achievement of the City's mission, vision and goals. Charter Officer performance evaluations shall be conducted after the conclusion of each fiscal year.

The purpose of the Charter Officer evaluation is to provide timely, clear and focused input to the Charter about how well he or she is performing in the key performance areas identified as most critical by the City Commission in achieving the City of Gainesville's strategic objectives.

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### **Commission Instructions:**

Evaluate the Charter Officer's performance for each area of accountability using the rating scale outlined below. Consider all criteria together when forming an impression about the Charter Officer's performance. Add comments you believe provide context to your rating or that would be helpful to the Charter Officer.

Performance Descriptors and Rating Scale		
5	Superior	Work performance consistently exceeds all performance expectations and displays a consistent level of exceptional performance. This is consistent, exceptional performance.
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**Ratings 2 or below should include comments and if applicable provide specific suggestions for performance improvement.**

### **Charter Officer Instructions and Next Steps:**

- Using the above Rating Scale, the Charter Officer will self-evaluate and rate his or her performance. The Charter Officer should also attach his or her **Accomplishments List or Report** to the form.
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**Fiscal Year:**

**Evaluator:**



## Charter Officer Annual Performance Evaluation Form

Charter Officer: Stephen Mhere

Title: City Auditor

**\*Overall Support of City Commission Goals and Objectives.** Demonstrates an understanding of and supports the City's philosophy (vision, mission, values); actively pursues an understanding of organizational goals and objectives and how these relate to the Charter Officers' job and department.

**\*Charter to attach Accomplishments Report for Evaluation Period**

Commission Member: Check performance rating    1 ☐    2 ☐    3 ☐    4 ☐    5 ☒    N/A ☐

Commission Member Comments:

*You clearly understand the direction of the Commission & run your office efficiently & effectively within that direction.*

Charter Officer: Check self-evaluation rating    1 ☐    2 ☐    3 ☐    4 ☐    5 ☒    N/A ☐

**Charter Officer Comments:** Enterprise risk assessment and IT risk assessment. Audit agenda for FY 2025 that covers both General Government and IT. Training for one of the audit managers for a qualification to perform peer reviews. This enables reciprocity within the ALGA community, serving the City Auditor a considerable amount of money (approximately \$15,000 to \$23,000) when peer review is required. Achieved 100% management concurrence on audit recommendations (management agreement to implement).

### Competencies:

**1. Business Acumen.** Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating    1 ☐    2 ☐    3 ☐    4 ☐    5 ☒    N/A ☐

Commission Member Comments:

*Your business acumen is clearly more than enough to merit outstanding results in this regard.*

Charter Officer: Check self-evaluation rating    1 ☐    2 ☐    3 ☐    4 ☒    5 ☐    N/A ☐

**Charter Officer Comments:** **Strategic Thinking:** Ability to align audit objectives with the city's goals, prioritize high-risk areas, and provide actionable recommendations to enhance operational efficiency. **Financial Expertise:** Strong understanding of budgeting, financial planning, and cost-saving strategies to ensure effective resource utilization and fiscal accountability. **Regulatory Knowledge:** Deep familiarity with governmental policies, regulations, and compliance standards to assess and enhance adherence effectively. **Ethical Leadership:** Commitment to integrity and transparency in safeguarding public trust and ensuring accountability.





## Charter Officer Annual Performance Evaluation Form

- 2. Communication and Building Relationships.** Communicates and listens effectively, open to receiving and giving constructive feedback, promotes frank and open discussions on issues. Cultivates a network of relationships both internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

**Commission Member: Check competency rating**    1 ☐    2 ☐    3 ☐    4 ☐    5 ☒    N/A ☐

Commission Member Comments:

*You are doing an excellent job working a building relationships with your staff, with other departments and with the Commission.*

**Charter Officer: Check self-evaluation rating**    1 ☐    2 ☐    3 ☐    4 ☐    5 ☒    N/A ☐

**Charter Officer Comments:** **Effective communication:** Listening effectively and being open to receiving and giving constructive feedback. I promote frank and open discussions on issues, including audit issues with management. I have introduced an approach to disseminate audit findings where each finding is discussed in detail with management at the moment of discovery instead of waiting for exit conference. This promotes collaboration and removes barriers across departmental lines, builds credibility for the City. **Relationships:** Communication with GRU is an example of my desire to build or keep our relationships with stakeholders strong (splitting of the Fleet audit; formal communication of recommendations needing follow-up; coordination of ethics training for elected officials and members of various boards, including invitation to GRUA board members). Reaching out to accounting professors at UF is another example of desire to build relationships with Gainesville community.

- 3. Fiscal Management.** Prepares a balanced budget to provide services at a level directed by the Commission, ensuring actions and decisions reflect an appropriate level of responsibility for financial planning and accountability.

**Commission Member: Check competency rating**    1 ☐    2 ☐    3 ☐    4 ☐    5 ☒    N/A ☐

Commission Member Comments:

*Your fiscal management has been beyond reproach.*

**Charter Officer: Check self-evaluation rating**    1 ☐    2 ☐    3 ☐    4 ☒    5 ☐    N/A ☐

**Charter Officer Comments:** **Austerity Measures:** As City Auditor, I reduced the budget by introducing a new audit management software, temporarily shifting to manual processes to facilitate the transition. This initiative saved approximately \$33,000 over three years. Additionally, I reorganized the department during staff turnover, achieving \$27,000 in savings. These efforts demonstrated financial accountability and strategic planning.



## Charter Officer Annual Performance Evaluation Form

**4. Leading and Supervision.** Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check rating

1 ☐

2 ☐

3 ☐

4 ☐

5 ☒

N/A ☐

Commission Member Comments:

*You have done an excellent job  
integrating our style into the  
Organization.*

Charter Officer: Check self-evaluation rating

1 ☐

2 ☐

3 ☐

4 ☐

5 ☒

N/A ☐

**Charter Officer Comments:** To develop and maximize employee performance while fostering high standards aligned with the department's vision and goals, I empower staff to innovate within their objectives and maintain an open-door policy for guidance and idea-sharing. I critically evaluate ideas by playing devil's advocate, encouraging robust analysis and well-rounded solutions. To ensure commitment, I engage all staff members in discussions before adopting any policy positions, fostering collaboration and buy-in. This approach promotes a culture of innovation, inclusivity, and accountability, driving both individual and departmental success.

Charter Officer Signature: \_\_\_\_\_

Date: 01.13.2025

Commission Member Signature: \_\_\_\_\_

Date: 12/19/24

Return fully completed Charter Officer Performance Evaluation form to Human Resources Director, Box 20



## Charter Officer Annual Performance Evaluation Form

### Introduction:

The City Commission is responsible for conducting Charter Officer annual evaluations ensuring the Charter contributes to the achievement of the City's mission, vision and goals. Charter Officer performance evaluations shall be conducted after the conclusion of each fiscal year.

The purpose of the Charter Officer evaluation is to provide timely, clear and focused input to the Charter about how well he or she is performing in the key performance areas identified as most critical by the City Commission in achieving the City of Gainesville's strategic objectives.

The Charter Officer should be evaluated using criteria established by the Commission, aligning with established core competencies, review rating scale criteria and salary adjustment schedules as determined by Human Resources. Human Resources will notify the Commission at least one month in advance of performance evaluation due dates. Annual salary increases will be based on the Charter Officer's performance of established objectives in the prior fiscal year. Any annual awards are made based on market considerations and according to budgetary or fiscal constraints.

### Commission Instructions:

Evaluate the Charter Officer's performance for each area of accountability using the rating scale outlined below. Consider all criteria together when forming an impression about the Charter Officer's performance. Add comments you believe provide context to your rating or that would be helpful to the Charter Officer.

Performance Descriptors and Rating Scale		
5	Superior	Work performance consistently exceeds all performance expectations and displays a consistent level of exceptional performance. This is consistent, exceptional performance.
4	Exemplary	Work performance consistently achieves all performance expectations and key elements of performance consistently are carried out in an exceptional manner or sustained periods. This is consistent, outstanding performance.
3	Meets Expectations	Work performance consistently achieves all performance expectations for this factor.
2	Needs Improvement	Work performance on one or more elements is less than expected and requires some improvements to fully meet performance standards.
1	Did Not Meet Expectations	Work performance within this factor is unacceptable. Performance did not meet expected performance standards.

**Ratings 2 or below should include comments and if applicable provide specific suggestions for performance improvement.**

### Charter Officer Instructions and Next Steps:

- Using the above Rating Scale, the Charter Officer will self-evaluate and rate his or her performance. The Charter Officer should also attach his or her **Accomplishments List or Report** to the form.
- Charter Officer to submit completed self-evaluation and accomplishments report to Human Resources.
- Charter Officer to schedule individual evaluation discussion meetings with each Commission member to discuss self-evaluation and list of accomplishments. Charters should also be prepared to discuss objectives for next fiscal year.
- After reviewing the Charter Officer self-evaluation and accomplishments report with the Charter Officer, each Commission member will provide an evaluation rating, using the above Rating Scale.
- Following Commission and Charter performance evaluation discussion, completed performance evaluations are returned to Human Resources.
- Human Resources will compile and aggregate all Charter Officer evaluation ratings, coordinate and present for discussion during a publicly noticed Commission meeting. Note: Salary increases are budgeted in a personal services contingency account and recommended salary increases will be processed within established payroll processing timelines.

Fiscal Year: 2024

Evaluator: Casey Willits



## Charter Officer Annual Performance Evaluation Form

Charter Officer: Stephen Mhere

Title: City Auditor

**\*Overall Support of City Commission Goals and Objectives.** Demonstrates an understanding of and supports the City's philosophy (vision, mission, values); actively pursues an understanding of organizational goals and objectives and how these relate to the Charter Officers' job and department.

**\*Charter to attach Accomplishments Report for Evaluation Period**

Commission Member: Check performance rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Auditor Mhere has spent his first year learning his lay of the city, evaluating the current status of his office, and building his vision of how his office can accomplish its job while supporting Commission goals & values.

Charter Officer: Check self-evaluation rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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**Charter Officer Comments:** Enterprise risk assessment and IT risk assessment. Audit agenda for FY 2025 that covers both General Government and IT. Training for one of the audit managers for a qualification to perform peer reviews. This enables reciprocity within the ALGA community, serving the City Auditor a considerable amount of money (approximately \$15,000 to \$23,000) when peer review is required. Achieved 100% management concurrence on audit recommendations (management agreement to implement).

### Competencies:

1. **Business Acumen.** Understands the business, financial status of the organization and core operational area of responsibility; realizes implications of key financial indicators, and uses economic and industry data to accurately diagnose business strengths and weaknesses.

Commission Member: Check competency rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Commission Member Comments:

Auditor Mhere clearly loves his profession. He shows commitment to the success of his office and most importantly his role in government. He is on a path to build his office into a great pillar of Gainesville's government.

Charter Officer: Check self-evaluation rating

1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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**Charter Officer Comments:** **Strategic Thinking:** Ability to align audit objectives with the city's goals, prioritize high-risk areas, and provide actionable recommendations to enhance operational efficiency. **Financial Expertise:** Strong understanding of budgeting, financial planning, and cost-saving strategies to ensure effective resource utilization and fiscal accountability. **Regulatory Knowledge:** Deep familiarity with governmental policies, regulations, and compliance standards to assess and enhance adherence effectively. **Ethical Leadership:** Commitment to integrity and transparency in safeguarding public trust and ensuring accountability.



## Charter Officer Annual Performance Evaluation Form

- 2. Communication and Building Relationships.** Communicates and listens effectively, open to receiving and giving constructive feedback, promotes frank and open discussions on issues. Cultivates a network of relationships both internal and external, promotes collaboration and removes barriers across organizational lines, builds credibility for the City.

**Commission Member: Check competency rating** 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☒ N/A ☐

Commission Member Comments:

Auditor Moore shows skill and grace in sorting out the functions of the office in regards to GRUA. He has appropriate relationships with Charter Officers whose offices he is auditing.

**Charter Officer: Check self-evaluation rating** 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☒ N/A ☐

**Charter Officer Comments:** **Effective communication:** Listening effectively and being open to receiving and giving constructive feedback. I promote frank and open discussions on issues, including audit issues with management. I have introduced an approach to disseminate audit findings where each finding is discussed in detail with management at the moment of discovery instead of waiting for exit conference. This promotes collaboration and removes barriers across departmental lines, builds credibility for the City. **Relationships:** Communication with GRUA is an example of my desire to build or keep our relationships with stakeholders strong (splitting of the Fleet audit; formal communication of recommendations needing follow-up; coordination of ethics training for elected officials and members of various boards, including invitation to GRUA board members). Reaching out to accounting professors at UF is another example of desire to build relationships with Gainesville community.

- 3. Fiscal Management.** Prepares a balanced budget to provide services at a level directed by the Commission, ensuring actions and decisions reflect an appropriate level of responsibility for financial planning and accountability.

**Commission Member: Check competency rating** 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☒ N/A ☐

Commission Member Comments:

In a small and space office, he is doing what I expect. I hope we can retain a position for him in the future.

**Charter Officer: Check self-evaluation rating** 1 ☐ 2 ☐ 3 ☐ 4 ☒ 5 ☐ N/A ☐

**Charter Officer Comments:** **Austerity Measures:** As City Auditor, I reduced the budget by introducing a new audit management software, temporarily shifting to manual processes to facilitate the transition. This initiative saved approximately \$33,000 over three years. Additionally, I reorganized the department during staff turnover, achieving \$27,000 in savings. These efforts demonstrated financial accountability and strategic planning.



## Charter Officer Annual Performance Evaluation Form

- 4. Leading and Supervision.** Effectively establishes strategies to develop and maximize employee performance, foster high standards in meeting the vision, mission and goals of the department.

Commission Member: Check rating

1 ☐

2 ☐

3 ☐

4 ☒

5 ☐

N/A ☐

Commission Member Comments:

The next year will show how much Mr. Burke builds his team through vacancies and staff trans. from 1.

Charter Officer: Check self-evaluation rating

1 ☐

2 ☐

3 ☐

4 ☐

5 ☒

N/A ☐

**Charter Officer Comments:** To develop and maximize employee performance while fostering high standards aligned with the department's vision and goals, I empower staff to innovate within their objectives and maintain an open-door policy for guidance and idea-sharing. I critically evaluate ideas by playing devil's advocate, encouraging robust analysis and well-rounded solutions. To ensure commitment, I engage all staff members in discussions before adopting any policy positions, fostering collaboration and buy-in. This approach promotes a culture of innovation, inclusivity, and accountability, driving both individual and departmental success.

Charter Officer Signature: \_\_\_\_\_

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

01.13.2025

Commission Member Signature: \_\_\_\_\_

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

12/30/25

Return fully completed Charter Officer Performance Evaluation form to Human Resources Director, Box 20