



Charter Officer Annual Performance Evaluation Form

Fiscal Year: 2022	Evaluator: <i>Lyndie M. Chestnut</i>
Charter Officer: Anthony L. Cunningham	Title: Interim General Manager

Goal(s) If needed use additional goals sheet (page 5):

***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**

Describe Goal(s):

- Goal 1: Equitable Community
- Goal 2: More Sustainable Community
- Goal 3: A Great Place to Live & Experience
- Goal 4: Resilient Local Economy
- Goal 5: Best in Class Neighbor Services

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 checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

The Mission of GRU absolutely aligns with the five primary goals established by the City Commission. Find below examples of GRU priorities and objectives that align with each goal:

Goal 1: Equitable Community – modernizing the billing & metering system to allow customer service representatives to better serve customers by providing accurate information in a timely manner as well as improved user interface to empower customers with projected and actual usage. These improvement projects, CIS & AMI, are on schedule.

Goal 2: More Sustainable Community – developed a plan for public input and engagement in the Integrated Resource Plan to begin in 2023. Leveraged federal funds to increase the number of home improvements through LEEP (improved 132 homes in FY22).

Goal 3: A Great Place to Live & Experience – ensured continued reliability of the essential utilities (Water, Electric, Wastewater, Natural Gas and Telecommunications) to serve the community by upgrading, renewing and replacing aging infrastructure across the system. Planned and prepared staff across the utility to be trained and ready for emergency response such as a hurricane to ensure customers essential utility services are restored as quickly as possible when an unexpected outage occurs.

Goal 4: Resilient Local Economy – in order to support a resilient local economy GRU is committed to maintaining its credit rating by implementing a debt management policy with a focusing on defeasing debt, tracking credit metrics and implementing financial decisions to support the credit metrics. GRU also is focused on pursuing and obtaining grants that support the utilities mission and thereby reduce debt obligations.

Goal 5: Best in Class Neighbor Services – GRU continues to remain committed to a safety culture by building on the SafeStart principles. GRU remains committed to providing safe, reliable utility services in an environmentally responsible manner equitably to all customers. GRU delivers clean drinking water, reliable power, provides wastewater service, natural gas service and telecommunications service to allow customers and neighbors throughout our community to thrive and flourish at home, work or play. We partner with businesses, schools, hospitals, neighbors and everyone to ensure these services support our community. The GRU mission is to reliably provide this core service and once again, our employees delivered on this promise.

Competencies:



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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:

Worked diligently to find ways to reduce address sheet utility bills. Demonstrated expertise and knowledge in short and long term planning.

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

Charter Officer Comments:

GRU continues to steadfastly meet the mission of reducing expenses to minimize rising costs for customers. GRU proposed numerous financial transactions this year to reduce the cost of debt, defease debt or save money. GRU works with financial advisers within GRU staff as well as external advisers through the leadership of the CFO to track financial indicators and industry data to make wise decisions for the financial health of GRU and lower costs for customers. GRU is focused on delivering core utility services (electric, water, wastewater, natural gas and telecommunications) efficiently and effectively as it's primary mission.

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:

Always willing to work with the Commission with a "can do" attitude, even when things were not feasible. He made the decision palatable.

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

Charter Officer Comments:

The primary emphasis of the GRU leadership team this year was to focus on collaboration and communication between:

1. The GRU leadership team and throughout the organization
2. The Charter Officers
3. The GRU leadership team and City Commission
4. GRU and Customers, Neighbors and Community

We establish significant progress in growing this collaboration and communication in the organization by communicating on a weekly basis as a team the operations of the utility. The Charter Officers experienced a huge success by collaborating on the Strategic Plan that supports the City Commission goals that was presented in the Spring and approved by the City Commission. GRU focused on the community and customers this summer when fuel prices were soaring by increasing the impact of LEEP, adjusting policies to work with customers struggling with bills, communicating in multiple public forums, being transparent with the community concerning challenges and willingly looking at policies to determine the best path forward.

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



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Commission Member Comments:

Charter Officer: Check self-evaluation rating

1

2

3

4

5

N/A

Charter Officer Comments:

GRU executed on the balanced budget for FY22 and proposed a balanced budget for FY23 to provide a high level of service to the customers and neighbors to ensure clean drinking water, reliable electricity, high quality wastewater service, natural gas service and telecommunications services. GRU established goals and objectives for the year and delivered on the vast majority despite significant challenges such as labor shortages, supply chain delays and significant increases in costs. This required leadership to keep staff accountable and find creative mechanisms to reduce expenses, such as the multiple financial transactions that reduced costs this year. GRU was able to meet or spend less than the approved operating & capital budgets for FY22 and approve FY23 budgets that held to the levels established last year.



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4. Integrity. Demonstrates the highest level of integrity and ethical behavior, adhering to the City's code of conduct upholding the values of the City, challenges questionable work standards and confronts or reports suspicious practices to appropriate leaders or authorities.

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 checked="" type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

GRU has an established culture of integrity throughout the organization. Across the organization, GRU is entrusted with the responsibility to deliver critical services and this responsibility requires operating with integrity. GRU strived this year to demonstrate this integrity by focusing on transparency, collaboration and communication. GRU worked closely with the Utility Advisory Board, Joint Water and Climate Change Board, City Commission and other agencies to be responsive and open about operations and decision-making in order to establish this integrity and ethical behavior.

5. 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"/>
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Commission Member Comments:

*Team builder. Needs very well with board
Government for the overall success of the City.*

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:

GRU worked closely with the City Charters to establish a Strategic Plan that focused on the Goals of the City Commission. The GM then worked closely within GRU to establish a Strategic Plan that supports the City plan and meets the primary mission of GRU. The GRU Strategic Plan then drives the Goals & Objectives established for each employee throughout GRU to develop and maximize employee performance and foster clear direction and high standards in meeting the GRU vision, mission and goals for each department. These goals and objectives are then utilized to measure and evaluate employee performance as well as overall performance of the utility.

Charter Officer Signature: _____

Date: _____

Commission Member Signature: *Cynthia Chestnut*

Date: *11/14/22*

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



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Additional Goals Sheet

***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**

Goal 2 - Describe Goal(s):

Ensure GRU continues to **provide safe, reliable utility services** in an environmentally responsible and equitable manner.

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 checked="" type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
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Charter Officer Comments:

- ✓ **Delivered electric, gas, water, wastewater and telecommunications services** without major interruptions or significant environmental impacts.
- ✓ Established an **operational plan and budget** for FY23 consistent with the City Commission direction from FY22.
- ✓ GRU is commissioning an **Integrated Resource Plan (IRP)** for its electric utility to learn what is required to meet the City Commission's goal of net-zero community-wide greenhouse gas emissions by 2045. As part of the IRP, GRU will be conducting community engagement to better understand stakeholder priorities for future power needs. The Office of Sustainability has drafted a Request for Information to learn more about companies who have done community engagement for IRPs.
- ✓ **Chief Sustainability Officer and Department of Sustainability and Resiliency established.** The CSO position has been created filled with an acting officer. We are in the process of establishing the rest of the sustainability team. The Sustainability Office is focused on establishing a sustainable path forward for the utility including power generation, energy transmission, natural gas, water/wastewater and telecommunications. Community engagement is critical to developing and implementing these plans and the Integrated Resource Plan (IRP) will be the primary public engagement model.
- ✓ Responded to the **critical level of the fuel adjustment** while simultaneously performing outreach to keep customers apprised of increases and educating them how to manage usage and lower bills. Partnered with outside agencies to provide relief funding to customers struggling to pay bills during this unprecedented time.
- ✓ Currently evaluating **GRUCom** systems including (1) initiated negotiations for possible sale of the Trunk Radio System, (2) finalized external evaluation of Residential Broadband services and (3) continue work to determine the best path forward with line of business.
- ✓ Infusion of \$1.9 million of American Rescue Plan Act (ARPA) funds into our **LEEP^{plus} program**, which allows GRU to enhance an Energy Rehabilitation program that has been successful since its inception in 2007, providing energy efficiency upgrades to more than 1,800 homes. Established and executed a plan to expand the LEEP^{plus} program to address rental properties, increase investment per home and the number of homes improved over the next three years. GRU's residential efficiency experts rolled the expanded