



# 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.



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<b>Fiscal Year: 2022</b>	<b>Evaluator:</b> <i>SLG</i>
<b>Charter Officer: Anthony L. Cunningham</b>	<b>Title: Interim General Manager</b>

**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

<b>Commission Member: Check performance 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:

*GM has embraced the role fully. All efforts have been made to support the success of the utility and city. GM has handled unprecedented hurdles and maintained stability of the utility despite difficult choices.*

<b>Charter Officer: Check self-evaluation 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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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** – GRU is modernizing the billing & metering system to allow customer service representatives to better serve customers by providing accurate information in a timely manner. Additionally, an improved user interface will 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** – GRU ensured a 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 focus 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 utility's 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.



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### 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.	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: Check competency rating						
Commission Member Comments: 						
Charter Officer: Check self-evaluation rating						
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 prudent decisions for the financial health of GRU and to lower costs for customers. GRU is focused on delivering core utility services (electric, water, wastewater, natural gas and telecommunications) efficiently and effectively as its primary mission.						

<b>2. Communication and Building Relationships.</b> 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.	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: Check competency rating						
Commission Member Comments:						
Charter Officer: Check self-evaluation rating						
Charter Officer Comments: The primary emphasis of the GRU leadership team this year was to focus on collaboration and communication with: <ol style="list-style-type: none"> <li>1. The entire organization</li> <li>2. The Charter Officers</li> <li>3. The City Commission</li> <li>4. Customers and community members</li> </ol> We significantly grew this collaboration and communication throughout the organization by communicating information about utility operations weekly in team meetings. The Charter Officers experienced a huge success by collaborating on the Strategic Plan that supports the City Commission's goals; this 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.						

<b>3. Fiscal Management.</b> 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.
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<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"/>
Commission Member Comments:						
<b>Charter Officer: Check self-evaluation 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"/>
Charter Officer Comments:						
<p>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 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 cost increases. This required leadership to keep staff accountable and to 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 &amp; capital budgets for FY22 and approve FY23 budgets that held to the levels established last year.</p>						





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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       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:

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       2       3       4       5       N/A

Commission Member Comments:

*GM has shown exemplary temperament to take over at difficult time. Has worked to recruit and retain talent.*

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

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: *[Signature]*

Date: 11/24/22

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.

<b>Commission Member: Check performance 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:

<b>Charter Officer: Check self-evaluation 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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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 solicited responses and evaluated bids and is close to signing a contract with a vendor to perform community engagement.
- ✓ **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<sup>plus</sup> 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 LE<sup>plus</sup> 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



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program out on May 2, 2022, after making the necessary updates. We completed 132 LEEP homes in FY22, 396 residential and 68 commercial surveys.

- ✓ **Utility Debt Forgiveness** – Utilized ARPA funds to pay \$24,158 to 32 households to address installment payment plans related to COVID hardships.
- ✓ **Improved communication with the UAB** and developed a work plan to focus and prioritize topics for the coming year. Began work on updating and improving the UAB energy policy. GRU staff and the UAB are collaborating to improve the plan.
- ✓ **Expanded outreach efforts** to outperform previous efforts to win the **National Mayor’s Challenge for Water Conservation**, placing second overall and first in the SEC
- ✓ Increased the number of **GRU in the Neighborhood** engagements and participated in two City Services Fairs

**City Commission Approvals** to continue providing efficient core utility services:

- ✓ **Selection of Progressive Design-Build Firm for the Groundwater Recharge Wetland Project** to provide additional groundwater recharge and a public park.
- ✓ **Extension of Solar Photovoltaic PPA** and continue to work with Origis to provide 50 MW of solar.
- ✓ Electric Transmission Service **Contract with City of Alachua**.
- ✓ **Multiple Financial transactions** to reduce costs and risks and continue on the path to long-term financial stability.
- ✓ Transfer of **management of the Boulware Springs** facility to Parks, Recreation and Cultural Affairs to improve this City asset for the community.
- ✓ **Updated streetlight and rental lighting program** to better reflect cost of services as well as **transferring ownership of public works lights** to better improve efficiencies City-wide in operation and maintenance of infrastructure.
- ✓ **Approved the GRU budget for FY2023** which provides for continued ability to operate, maintain and improve the supply of electricity, water, natural gas, wastewater and telecommunications to our community.
- ✓ **Letter of Support for GRU’s Sweetwater Branch Stabilization Project**

**Goal 3 - Describe Goal(s):**

Improve communication and collaboration throughout organization, with City Charters, with City Commission in an effort to support One City.

<b>Commission Member: Check performance 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:

*GM assisted GG with Finance office and shared resources/talent.*

<b>Charter Officer: Check self-evaluation 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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### Charter Officer Comments:

- ✓ All six charters worked collaboratively to **align the City Commission's Strategic Plan** with each charter's area of responsibility. The six charter officers worked together and with the City Commission to ensure stabilization of core operations and internal processes. Four critically important areas were identified as top priorities: GG financial services operations, technology (Workday)/infrastructure, vacancies city-wide, and the City's organizational culture. GRU staff led the stabilization of GG Finance until it was ready to hand over to newly hired Finance Director and is leading the stabilization of Workday, GG's Finance and Human Capital ERP. Both require(d) significant staff resources.
- ✓ **GRU's Budget, Finance and Accounting Team** provided a significant level of assistance with stabilization of GG's Finance Department, which fell under critical review by both the State Auditor General and Internal Audit offices. Under the leadership of our CFO, Claudia Rasnick, root problems in the areas of deficiency were identified and a work plan put in place to address the issues identified. Foundational work was completed. This effort doubled the work of several senior level GRU employees for approximately six months. **GRU's team led the recovery efforts**, including completing financial statements, federal and state reports, bank reconciliations, and **filling two key positions** for the department, the Finance Director and Controller.
- ✓ GRU is providing significant staff resources for **Workday Stabilization** including GRU IT expertise leading the stabilization effort and steering committee members to address insufficient requirements gathering, lack of business processes, configuration deficiencies, insufficient staff training and ongoing Workday readiness for both the GG Finance and H.R. functionality of Workday.
- ✓ Expanded Cyber Security training and outreach across the City.
- ✓ Yvette Carter developed the **One City One Community Relations Plan** that outlines the City's approach to community outreach, engagement, partnerships, investments and advocacy, modeling it on her GRU community relations work. This includes the Community F.I.R.S.T. program, a program that prioritizes a Facilitative, Innovative, Restorative, Supportive, and Timely approach to neighborhood services.
- ✓ Held **weekly standing meetings** with the City Manager to increase communication, encourage relationship-building, align decision-making and streamline service delivery city-wide.
- ✓ Partnered with the Office of Equity & Inclusion to hand over **GRU's Inclusion work** that started two years ago.
- ✓ Aligned internal **citywide communications** by consolidating "InsideGNV" and "GRU Daily" to create "The Daily Brief."
- ✓ Combined two separate offices within General Government and GRU to **establish the Office of Government Affairs and Community Relations**, reporting to the City Manager with dotted line responsibility to the GRU General Manager.
  - GACR emphasizes city-wide community impact and serves as a consultant to each department with a particular focus on community engagement and outreach.
  - GACR builds and maintains relationships with GRU customers by employing equitable and inclusive community engagement.
- ✓ Human Resources Department reports to the City Manager with a dotted line responsibility to the GRU General Manager, emphasizing citywide internal service delivery. A **strong partnership was reestablished between H. R. and GRU**, with GRU providing H. R. assistance from the previous H. R. Director, Cheryl McBride, as needed and where requested. A Service Level Agreement was developed and presented to the H. R. Director for agreement.
- ✓ **GRU IT has improved lines of communication** with General Government departments to gather information, share expertise and where appropriate, support GG's technology needs. GG's IT team moved into GRU facilities to be in close proximity to GRU IT to partner more closely. A Service Level Agreement was developed and presented to Ms. Curry for agreement.
- ✓ Working alongside the City Manager, developing plan to align I.T. services across the entire City under the Chief Information Officer, Walter Banks.
- ✓ In partnership with Ms. Curry, Interim City Manager, we **continue to evaluate opportunities to streamline areas of shared services** to promote efficiency throughout the organization