

## **GENERAL MANAGER EVALUATION CRITERIA**

### **Relationship with the Board**

- Keeps board informed of district activities, progress and problems
- Receptive to board member ideas and suggestions
- Provides options and sound recommendations for board action
- Follows through on board directives
- Facilitates the decision-making process with the board
- Reports to board regularly about progress toward district objectives
- Accepts board criticism as constructive suggestions for improvement
- Follow up on all problems and issues brought to his/her attention
- Delegates to staff appropriate tasks
- Encourages a team effort between board, management and staff

### **Management Skills and Abilities**

- Maintains a smooth-running administrative office
- Oversees preparation of agendas, district reports and accurate record keeping
- Speaks and writes clearly
- Proposes district goals and objectives prior to each fiscal year
- Annually provides district report regarding objectives met during past year
- Identifies short-term and long-term issues that need to be addressed
- Formulates action plans to implement these issues
- Is progressive in attitude and action
- Consults with attorney on all legal aspects of district operations
- In cases of emergency or disaster, acts in accordance with situation and then makes a report of these actions to the board

### **Effective Leadership**

- Hires and retains competent staff members
- Encourages staff development through education and growth opportunities
- Works to maintain high employee morale
- Knows and follows district personnel policies
- Maintains high staff productivity
- Contributes to a team effort with staff
- Promotes safety, addresses potentially unsafe issues immediately and notifies board of these issues

## **GENERAL MANAGER EVALUATION CRITERIA CONTINUED**

### **Fiscal Management**

- Prepares a balanced budget
- Completes the year with a balanced budget
- Displays common sense and good judgment in business transactions
- Demonstrates knowledge of physical plant operations
- Approves purchases and expenditures within limits of board-approved budget
- Provides information to board regarding purchases and expenditures
- Reports to board regularly regarding financial status of district
- Supervises district's accounting practices
- Works with auditor to make accounting practices more efficient

### **Services to Public Served**

- Understands and stays current with the needs of the community served
- Accepts criticism from constituents and responds appropriately
- Notifies board of community/management criticisms

### **Community and Public Relations**

- Represents the district in a positive and professional manner
- Actively promotes the district to the public
- Promotes public understanding of district services available
- Publishes district accomplishments
- Continually evaluates programs and facilities to meet need of community

### **Personal and Professional Attributes**

- Adheres to professional codes of ethics
- Maintains professional and technical knowledge by attending workshops, networking, reviewing publications and participating in professional organizations

GENERAL MANAGER EVALUATION CRITERIA CONTINUED

Fiscal Management

- Prepares a balanced budget
• Completes the year with a balanced budget
• Displays common sense and good judgment in business transactions
• Demonstrates knowledge of physical plant operations
• Approves purchases and expenditures within limits of board-approved budget
• Provides information to board regarding purchases and expenditures
• Reports to board regularly regarding financial status of district
• Supervises district's accounting practices
• Works with auditor to make accounting practices more efficient

Services to Public Served

- Understands and stays current with the needs of the community served
• Accepts criticism from constituents and responds appropriately
• Notifies board of community/management criticisms

Community and Public Relations

- Represents the district in a positive and professional manner
• Actively promotes the district to the public
• Promotes public understanding of district services available
• Publishes district accomplishments
• Continually evaluates programs and facilities to meet need of community

Personal and Professional Attributes

- Adheres to professional codes of ethics
• Maintains professional and technical knowledge by attending workshops, networking, reviewing publications and participating in professional organizations

GENERAL MANAGER EVALUATION

General Manager: \_\_\_\_\_ Evaluation Period: \_\_\_\_\_

Use the rating scale below to answer the following statements

1 Does not do it 2 3 OK 4 5 Outstanding

A. Relationship with the Board

- 1. \_\_\_\_\_ Keeps board informed of district activities, progress and problems.
2. \_\_\_\_\_ Is receptive to board member ideas and suggestion.
3. \_\_\_\_\_ Provides options and sound recommendations for board action.
4. \_\_\_\_\_ Makes budgetary impacts known before board action.
5. \_\_\_\_\_ Follows through on board directives.
6. \_\_\_\_\_ Facilitates the decision-making process with the board.
7. \_\_\_\_\_ Reports to board regularly about progress toward district objectives.
8. \_\_\_\_\_ Accepts board criticism as constructive suggestions for improvement.
9. \_\_\_\_\_ Follows up on all problems and issues brought to his or her attention.
10. \_\_\_\_\_ Delegates to staff appropriate tasks.
11. \_\_\_\_\_ Encourages a team effort between staff, management and board.

Comments:

In every comment section, board members may make general comments about the entire section or place a number (or several numbers) at the left side of page and make comments about specific observations relating to the number from the above list.

Four horizontal lines for writing comments.

**B. Management Skills and Abilities**

1. \_\_\_\_\_ Maintains a smooth-running administrative office.
2. \_\_\_\_\_ Oversees preparation of agendas, district repofls and accurate record keeping.
3. \_\_\_\_\_ Speaks and writes clearly.
4. \_\_\_\_\_ Proposes district goals and objectives prior to each fiscal year.
5. \_\_\_\_\_ Provides annual report regarding objectives met during past year.
6. \_\_\_\_\_ Identifies short term and long term issues that need to be addressed.
7. \_\_\_\_\_ Formulates action plans to implement these issues.
8. \_\_\_\_\_ Is progressive in attitude and action.
9. \_\_\_\_\_ Consults with attorney on all legal aspects of the district operations.
10. \_\_\_\_\_ In case of an emergency or disaster, acts in accordance with the situation and then makes a report of these actions to the board.

Comments:

---

---

---

**C. Services to People Served**

1. \_\_\_\_\_ Understands and stay current with the needs of the community served.
2. \_\_\_\_\_ Accepts criticism from the people served and responds appropriately.
3. \_\_\_\_\_ Notifies board of community/management criticisms.

Comments:

---

---

---

**D. Fiscal Management**

1. \_\_\_\_\_ Prepares a balanced budget.
2. \_\_\_\_\_ Completes the year with a balanced budget.
3. \_\_\_\_\_ Displays common sense and good judgement in business transactions.
4. \_\_\_\_\_ Demonstrates knowledge of physical plant operations.
5. \_\_\_\_\_ Approves purchases and expenditures within limits of board approved budget.
6. \_\_\_\_\_ Provides information to board regarding purchases and expenditures.
7. \_\_\_\_\_ Reports to board regularly regarding financial status of district.
8. \_\_\_\_\_ Supervises district's accounting practices.
9. \_\_\_\_\_ Works with auditor to make accounting practices more efficient.

Comments:

---

---

---

**B. Management Skills and Abilities**

1. \_\_\_\_\_ Maintains a smooth-running administrative office.
2. \_\_\_\_\_ Oversees preparation of agendas, district reports and accurate record keeping.
3. \_\_\_\_\_ Speaks and writes clearly.
4. \_\_\_\_\_ Proposes district goals and objectives prior to each fiscal year.
5. \_\_\_\_\_ Provides annual report regarding objectives met during past year.
6. \_\_\_\_\_ Identifies short term and long term issues that need to be addressed.
7. \_\_\_\_\_ Formulates action plans to implement these issues.
8. \_\_\_\_\_ Is progressive in attitude and action.
9. \_\_\_\_\_ Consults with attorney on all legal aspects of the district operations.
10. \_\_\_\_\_ In case of an emergency or disaster, acts in accordance with the situation and then makes a report of these actions to the board.

Comments: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**C. Services to People Served**

1. \_\_\_\_\_ Understands and stay current with the needs of the community served.
2. \_\_\_\_\_ Accepts criticism from the people served and responds appropriately.
3. \_\_\_\_\_ Notifies board of community/management criticisms.

Comments: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**D. Fiscal Management**

1. \_\_\_\_\_ Prepares a balanced budget.
2. \_\_\_\_\_ Completes the year with a balanced budget.
3. \_\_\_\_\_ Displays common sense and good judgement in business transactions.
4. \_\_\_\_\_ Demonstrates knowledge of physical plant operations.
5. \_\_\_\_\_ Approves purchases and expenditures within limits of board approved budget.
6. \_\_\_\_\_ Provides information to board regarding purchases and expenditures.
7. \_\_\_\_\_ Reports to board regularly regarding financial status of district.
8. \_\_\_\_\_ Supervises district's accounting practices.
9. \_\_\_\_\_ Works with auditor to make accounting practices more efficient.

Comments: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**E. Personal and Professional Attributes**

1. \_\_\_\_\_ Adheres to professional code of ethics.
2. \_\_\_\_\_ Maintains professional and technical knowledge by attending workshops, net-working, reviewing publications, and participating in professional societies.

Comments: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**F. Community and Public Relations**

1. \_\_\_\_\_ Represents the district in a positive and professional manner.
2. \_\_\_\_\_ Actively promotes the district to the public.
3. \_\_\_\_\_ Promotes public understanding of district services available.
4. \_\_\_\_\_ Publishes accomplishments of district.
5. \_\_\_\_\_ Continually evaluates programs and facilities to meet needs of community

Comments: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**G. Effective Leadership of Staff**

1. \_\_\_\_\_ Hires and maintains competent staff members.
2. \_\_\_\_\_ Encourages staff development through education and growth opportunities.
3. \_\_\_\_\_ Works to maintain high employee morale.
4. \_\_\_\_\_ Knows and follows district personnel policies.
5. \_\_\_\_\_ Maintains high staff productivity.
6. \_\_\_\_\_ Contributes to the team effort within staff.
7. \_\_\_\_\_ Promotes safety, addresses potentially unsafe issues immediately, and notifies the board of these issues.

Comments: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

BOARD CHAIR \_\_\_\_\_ DATE \_\_\_\_\_

BOARD VICE CHAIR \_\_\_\_\_ DATE \_\_\_\_\_

BOARD SECRETARY \_\_\_\_\_ DATE \_\_\_\_\_

BOARD MEMBER \_\_\_\_\_ DATE \_\_\_\_\_

BOARD MEMBER \_\_\_\_\_ DATE \_\_\_\_\_

(NAME OF DISTRICT)

**GENERAL MANAGER EVALUATION**

General Manager: \_\_\_\_\_ For Calendar Year: \_\_\_\_\_

*Rating scale: 1 to 5 with 1=very poor and 5=exceptional and Narrative Comments  
Please provide numerical rating and comments below.*

**I. The General Manager's Relationship with the Board**

**Rating:**

*Comments:*

---

---

---

**II. The General Manager's Management Skills and Abilities**

**Rating:**

*Comments:*

---

---

---

**III. The General Manager's Relationship to People Served**

**Rating:**

*Comments:*

---

---

---

**IV. The General Manager's Fiscal Management Knowledge**

**Rating:**

*Comments:*

---

---

---



(NAME OF DISTRICT)

**GENERAL MANAGER EVALUATION**

General Manager: \_\_\_\_\_ For Calendar Year: \_\_\_\_\_

*Rating scale: 1 to 5 with 1=very poor and 5=exceptional and Narrative Comments  
Please provide numerical rating and comments below.*

**I. The General Manager's Relationship with the Board**

**Rating:**

*Comments:* \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**II. The General Manager's Management Skills and Abilities**

**Rating:**

*Comments:* \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**III. The General Manager's Relationship to People Served**

**Rating:**

*Comments:* \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**IV. The General Manager's Fiscal Management Knowledge**

**Rating:**

*Comments:* \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**V. The General Manager's Personal and Professional Attributes**

**Rating:**

*Comments:* \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**VI. The General Manager's Community and Public Relations Skills**

**Rating:**

*Comments:* \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**VII. The General Manager's Leadership**

**Rating:**

*Comments:* \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**VII. Recommendations**

*Comments:* \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

BOARD CHAIR \_\_\_\_\_ DATE \_\_\_\_\_  
BOARD VICE CHAIR \_\_\_\_\_ DATE \_\_\_\_\_  
BOARD SECRETARY \_\_\_\_\_ DATE \_\_\_\_\_  
BOARD MEMBER \_\_\_\_\_ DATE \_\_\_\_\_  
BOARD MEMBER \_\_\_\_\_ DATE \_\_\_\_\_

(NAME OF DISTRICT) (BOARD OF DIRECTORS)

**GENERAL MANAGER PERFORMANCE EVALUATION**

General Manager: \_\_\_\_\_ Evaluation Period: \_\_\_\_\_

**Instructions**

Assign a numerical value from 1 to 10 representing the overall rating for each performance factor listed below. The performance factor statements are not all inclusive. Please elaborate on strengths and weaknesses in the space provided, or attach additional pages as necessary.

<u>Excellent</u>	<u>Above Average</u>	<u>Satisfactory</u>	<u>Needs Improvement</u>	<u>Unsatisfactory</u>
10 – 9	8 – 7	6 – 5	4 – 3	2 – 1

**PERFORMANCE FACTORS**

**I. MANAGEMENT OF THE ORGANIZATION**

**OVERALL RATING:**

Does the Manager effectively assume responsibility of leadership? Does he/she coordinate and monitor individual departments and follow through to assure productivity? Does the Manager communicate performance expectations clearly while maintaining a team environment? Is the Manager decisive and firm when need be confronting problems promptly, and providing timely and comprehensive follow through? Does the Manager accurately appraise and correct the strengths/weaknesses of the organization and individuals? Is the Manager flexible and innovative in managing problems and does he/she communicate well at all levels?

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**II. FINANCIAL MANAGEMENT**

**OVERALL RATING:**

Does the budget show planned effort and thought? Are expenditures within available resources? Is the financial data presented to the board in a clear and concise manner? Is the budget prepared in time to allow the board necessary time to review and make comments?

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**III. COMMUNITY RELATIONS**

**OVERALL RATING:**

Does the Manager skillfully represent the district to the community and other agencies? Does the Manager properly avoid district politics and partisanship? Does the Manager show an honest interest in the community and properly defend the district's reputation?

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**IV. PROFESSIONAL GROWTH AND DEVELOPMENT**

**OVERALL RATING:**

Does the Manager demonstrate the professional skill and knowledge needed to perform the job? Does he/she keep informed of developments in the professional field and communicate and apply this knowledge to the job? Is the Manager active in professional organizations? Does the Manager assess his/her own strength and capabilities, identify needs for knowledge, skills, and experience, and design and implement a self-development plan when appropriate?

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**V. BOARD RELATIONS**

**OVERALL RATING:**

Is the Manager providing the board with adequate information to make decisions? Is the board provided with sufficient alternatives to avoid being forced into a decision? Is technical data presented in an understandable manner? Does the Manager respond to individual and collective board concerns in a timely manner? Is the staff responsive to board's direction? Does the Manager respond in a positive way to assignments, suggestions and guidance from the board?

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**VI. GOALS AND OBJECTIVES (FROM CURRENT REVIEW PERIOD)**

**OVERALL RATING:**

How well did the Manager meet the goals and objectives for this review period as established by the board and as identified under separate document?

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**OVERALL EVALUATION**

Excellent	Above Average	Satisfactory	Needs Improvement	Unsatisfactory
_____				

**ADDITIONAL COMMENTS:**

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_