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(City)

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Sean Lomen
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Cherri Spriggs
(Public)

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Youngblood
(City)

COUNSEL

Michael Walker
General Counsel

STAFF

Michelle McIntyre
Executive Officer

Amanda Ross
*Acting Assistant
Executive Officer*

Amy Engle
Commission Clerk

Wednesday, May 28, 2025, 10:30 AM

LAFCO Personnel Committee Meeting

Members of the Personnel Committee:
Commissioners Alpine, Eklund, Landon, Rohan, and
Alternate Commissioner Spriggs

Placer LAFCO Administrative Office
110 Maple Street
Auburn, CA 95603

AGENDA

1. ROLL CALL
2. CHANGES AND APPROVAL OF THE AGENDA
3. MINUTES
Minutes of the Personnel Committee Meeting on March 26, 2025.
4. BUSINESS ITEMS
 - A. Status of the Staffing Plan (Action)
 - B. Develop New Annual Evaluation Format for Non-Union Employees (the Executive Officer position) (Action)
 - C. Executive Officer's Report – The Executive Officer will orally provide an update on the Assistant Executive Officer recruitment.
5. ADJOURNMENT

PUBLIC ACCESS AND PUBLIC COMMENTS INSTRUCTIONS

Materials related to an item on this agenda are available for public inspection at the LAFCO office, 110 Maple Street,

Auburn, CA, during regular business hours and on LAFCO's website at <https://www.placer.ca.gov/lafco>.

LAFCO meetings are held in person and virtually. Meeting recordings are posted online within a week following the LAFCO meeting.

Members of the public may submit their comments in written form to the Commission via U.S. mail to Placer LAFCO's office or via email to lafco@placer.ca.gov. Please indicate the agenda item number, if any. If you want your comments read into the record, please indicate so in the subject line and limit the comments to no more than 500 words. For public hearings, the Chair will announce the opening and closing of the public hearing. The Chair will call for oral public comments. Please limit your comments to 3 minutes.

AMERICAN DISABILITY ACT COMPLIANCE

In compliance with the Americans with Disabilities Act, if you are a disabled person and need a disability-related modification or accommodation to participate in this meeting fully, please contact Amy Engle, Commission Clerk, at (530) 889-4602 or aengle@placer.ca.gov. Requests must be made as early as possible and at least two business days before the start of the meeting.

CAMPAIGN CONTRIBUTION DISCLOSURE

If you wish to participate in any proceeding involving a change of organization, reorganization, or other entitlement, you are prohibited from making a campaign contribution of more than \$250 to any Commissioner or Alternate Commissioner as described in Government Code section 84308. This prohibition begins on the date you begin to actively support or oppose an application pending before LAFCO and continues for 12 months after LAFCO renders a final decision. No Commissioner or Alternate Commissioner may solicit or accept a campaign contribution of more than \$250 from you or your agent during this period if the Commission or Alternate Commissioner knows or has reason to know that you will participate in the proceeding. If you or your agent have contributed more than \$250 to any Commissioner or Alternate Commissioner during the 12 months preceding the decision, that Commissioner or Alternate Commissioner must disqualify himself or herself from the proceeding. However, disqualification is not required if the Commissioner or Alternate Commissioner returns the campaign contribution within 30 days from when the Commissioner or Alternate Commissioner knows, or should have known, about the contribution and that you are a participant in the proceeding.



Placer County Local Agency Formation Commission
110 Maple Street Auburn, CA 95603 | (530) 889-4097

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MINUTES OF THE
LOCAL AGENCY FORMATION COMMISSION
PERSONNEL COMMITTEE

Members of the Personnel Committee:
Commissioners Alpine, Eklund, Landon, Rohan, and
Alternate Commissioner Spriggs

March 26, 2025

Placer LAFCO Administrative Office
110 Maple Street CA 95603

1. ROLL CALL

Chair Eklund opened the meeting at 9:23 AM.

Present Personnel Committee Commissioners: Joshua Alpine,
Whitney Eklund, Susan Rohan, and Cherri Spriggs

Not Present Personnel Committee Commissioners: Shanti Landon

Staff Present: Amy Engle, Commission Clerk, Michelle McIntyre,
Executive Officer, Amanda Ross, Acting Assistant Executive
Officer, Michael Walker, Legal Counsel (remote)

2. CHANGES AND APPROVAL OF THE AGENDA

There were no changes to the agenda.

The Committee approved the agenda.

3. MINUTES

Commissioner Rohan motioned to approve the March 13, 2025,
Personnel Committee Minutes, second by Commissioner Alpine.

The motion passed.

4. BUSINESS ITEM

Staffing Plan– Strategic Plan Goal 4 Implementation: Staff requests direction from the Personnel Committee on developing a staffing plan to achieve the objectives of the 2024-2028+ Strategic Plan Goal 4 objectives. This includes an evaluation of current staffing levels compared to benchmark LAFCOs.

This agenda item is continued from the Personnel Committee Meeting of March 13, 2025.

Executive Officer Michelle McIntyre introduced the item, referring to the Strategic Plan and its objectives for Goal 4 to ensure Placer LAFCO operates as a high-functioning organization.

The Committee discussed the item and various approaches to meet the Strategic Plan's goals.

Chair Eklund opened the item to public comments.

There were no public comments.

Commissioner Alpine motioned to approve the proposed alternative A option for staff to make recommendations to the Commission at the April meeting, second by Alternate Commissioner Spriggs.

ADJOURNMENT

Chair Eklund adjourned the meeting at 10:23 AM.

Submitted by:

Amy Engle
Placer LAFCO
Commission Clerk



Placer County Local Agency Formation Commission
110 Maple Street Auburn, CA 95603 | (530) 889-4097

COMMISSIONERS STAFF REPORT

Cindy Gustafson
*Chair
(County)*

DATE: May 28, 2025

Joshua Alpine
*Vice Chair
(Special District)*

TO: Members of the Personnel Committee

Whitney Eklund
(City)

FROM: Michelle McIntyre

Judy Friedman
(Special District)

SUBJECT: Status of the Staffing Plan

Shanti Landon
(County)

Sean Lomen
(City)

Susan Rohan
(Public)

ALTERNATE COMMISSIONERS

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Amanda Ross
*Acting Assistant
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Amy Engle
Commission Clerk

SUMMARY

At the Placer County Local Agency Formation Commission (LAFCO) meeting of February 19, 2025, the Commission appointed members to its Personnel Committee and established a scope of work to implement the Commission’s objectives related to Goal 4 of the Commission's Strategic Plan, which is to develop a cost-effective staffing plan that identifies and aligns appropriate staffing levels to implement the Strategic Plan and day-to-day responsibilities.

The Personnel Committee’s scope of work, established by the Commission, included the following:

- 1) Develop a staffing plan.
- 2) Conduct a compensation and classification study.
- 3) Develop a new annual evaluation format for non-union employees.

The purpose of this agenda item is to report on the status of item 1 of the established scope of work above and to request additional direction from the Committee. The Executive Officer requests that the Committee review and provide feedback and edits on the proposed job duties and tasks for the Senior LAFCO Analyst and the LAFCO Analyst II, the proposed new positions.

BACKGROUND

On August 21, 2024, the Commission completed its evaluation of the Executive Officer. During two meetings, the regular and alternate Commissioners thoroughly assessed the Executive Officer's performance. Throughout this process, the Commission established clear and actionable goals for the Executive Officer, which included:

- Five comments emphasized the necessity of hiring additional staff. There was also a recommendation that the Executive Officer spend more time "in the field" to better understand Placer County and its pressing issues.
- Five comments highlighted the critical need for the implementation of the robust strategic plan.
- One comment suggested that the Executive Officer prioritize the development of leadership capabilities among staff.
- Another comment stressed the importance of keeping the special districts focused on municipal service reviews, indicating a desire for more dedicated time for project management.
- Additional comments highlighted the need for updating policies, educating commissioners, improving communication with the Commission and stakeholders, and addressing other goals, all of which require extra staff time to fulfill these essential responsibilities.

Two months later, on October 9, 2024, the Commission adopted its strategic plan. The Commission's strategic plan aligns with many goals and objectives outlined in the Executive Officer's written evaluation, including creating a staffing plan.

On February 19, 2025, the Commission appointed members to its Personnel and Budget Committees. The Personnel Committee met on March 13 and again on March 26. During these meetings, the Personnel Committee reviewed various reports, including a research report on similar LAFCOs previously presented to the full Commission. It also examined staffing levels, budget comparisons, employee salaries and benefits, job specifications for Placer LAFCO and other similar LAFCOs, and the agreement between Placer County and Placer LAFCO executed in December 2000. Finally, the Personnel Committee reviewed the impact of the salary and benefits projections on the staffing plan and associated costs.

On April 22, 2025, the Commission approved the Proposed Workplan and Budget for the fiscal year (FY) 2025-26. This Proposed Workplan and associated Budget include funding for five full-time employees (FTEs), two of whom would be new positions. The Commission also directed the Executive Officer to hold a budget workshop and to convene a meeting of the Budget Committee.

On May 14, 2025, the Executive Officer held a budget workshop open to the public. On the same day, the Budget Committee met and instructed the Executive Officer to provide staffing options, including the status quo of three FTEs, four FTEs, and five FTEs, at the Commission's June 9, 2025, meeting.

DISCUSSION

May 28, 2025, Personnel Committee Meeting

Today, the Personnel Committee is meeting to receive an update on previously discussed items, including the proposed duties for the two requested positions: the LAFCO Senior Analyst and the LAFCO Analyst II. As noted above, the Committee previously reviewed job classifications and duties from Placer County, Placer LAFCO, and similar LAFCOs. Proposed lists of tasks were provided to Placer County Human Resources, which reviewed and edited them. Attachments A and B to this report include the two proposed lists of tasks.

STAFF RECOMMENDATION

The Executive Officer recommends that the Committee review the proposed lists of tasks and make any revisions it deems appropriate for the Commission's consideration.

ATTACHMENTS:

A – Proposed Tasks for Placer LAFCO Senior Analyst

B – Proposed Tasks for Placer LAFCO Analysts II

Proposed Tasks for LAFCO Senior Analyst

- Conduct analysis related to the California Environmental Quality Act (CEQA) and various special projects involving research, data collection, and other tasks associated with the operation of the Placer County Local Agency Formation Commission (LAFCO). Perform a range of specialized technical services involving administration, planning, finance, legislation, and data analysis.
- Manage and conduct special studies that require inter-jurisdictional or inter-agency coordination, often dealing with complex, controversial, and politically sensitive issues.
- Monitor and evaluate local agencies, their service capabilities, and proposals for changes of organization or reorganizations.
- Review and analyze project proposals submitted to LAFCO, conduct field investigations, make recommendations, and prepare and present staff reports to the Commission or the LAFCO Executive Officer, both in written and oral formats.
- Research, analyze, and interpret information and data necessary to meet state law requirements and align with Placer LAFCO policies and objectives.
- Manage contracts and consultants related to special studies.
- Make verbal presentations and oversee public participation and outreach processes concerning pending LAFCO proposals, studies, policies, and procedures. Explain governmental regulations, policies, and procedures to the public, governmental agencies, subordinate staff, and consultants.
- Execute the terms and conditions of LAFCO documents as determined by the Commission.
- May act in the Executive Officer's absence on a short-term basis.
- Assist with administrative functions, including the development of the LAFCO budget, fee schedules, surveys, policy and procedure manuals, application acceptance, and notifications of public hearings.
- Maintain, revise, and interpret LAFCO policies, procedures, and maps.
- Advise management on the impact of new and proposed state legislation and local policies affecting LAFCO.
- Act as a liaison between the Commission, the public, other governmental agencies, and organizations.

- Assist the Executive Officer in implementing the Commission's directions, policies, and procedures, as well as in developing, tracking, and managing the annual work program.
- Participate in LAFCO-related organizations and professional associations. Represent LAFCO on various committees and organizations as required.
- Perform other related duties as needed.
- Assist in overseeing the daily administration of LAFCO affairs in accordance with LAFCO and County of Placer policies and Memoranda of Understanding (MOUs), including accounts receivable and payable, as well as payroll.

LAFCO Analyst II – Proposed Tasks

- Conduct basic to intermediate research, data collection, and analysis to evaluate local agencies and their governmental services in preparation for municipal service reviews and related regional planning studies.
- Assist in various phases of processing application proposals for boundary changes, outside service extensions, and reorganizations of local government agencies. This includes project initiation, completion, and the tracking and maintenance of legal and policy deadlines.
- Utilize various computer software programs to create charts, tables, spreadsheets, maps, diagrams, graphs, and reports.
- Respond to public inquiries, exercising independent judgment to provide information or refer questions to other staff members as appropriate.
- Consult with staff and representatives from other governmental agencies on programs, projects, or specialized assigned activities.
- Assist in preparing agendas and related staff reports and organize and prepare the Commission packet for distribution.
- Provide support for all Commission meetings when needed, which includes posting legal notices, agendas, and meeting materials; offering staff support during meetings; preparing minutes and final meeting records; and tracking and maintaining deadlines related to legal and policy matters.
- Assist in making presentations to the Commission, other local agencies, and community groups.
- Support Commission actions by reviewing resolutions and related documents for accuracy, as well as distributing, recording, and filing Commission actions.
- Maintain the LAFCO website.
- Provide administrative support as needed, including processing timesheets, payroll and personnel transactions, claims, and purchase orders/requisitions; receiving funds; assisting in budget request preparation by researching and compiling information; and establishing and documenting clerical operations and work methods.
- Manage records and data files, encompassing administrative records, project files, archival files, inventory, and directories for local agencies.



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Michael Walker
General Counsel

STAFF

Michelle McIntyre
Executive Officer

Amanda Ross
Acting Assistant Executive Officer

Amy Engle
Commission Clerk

DATE: May 28, 2025
TO: Members of the Personnel Committee
FROM: Amanda Ross
SUBJECT: Development of New Annual Evaluation Format for Non-Union Employees (Executive Officer position)

SUMMARY

At the Placer County Local Agency Formation Commission (LAFCO) meeting of February 19, 2025, the Commission appointed members to its Personnel Committee and established a scope of work to implement the Commission's objectives related to Goal 4 of the Commission's Strategic Plan, which is to develop a cost-effective staffing plan that identifies and aligns appropriate staffing levels to implement the Strategic Plan and day-to-day responsibilities.

The Personnel Committee's scope of work established by the Commission included the following:

- 1) Develop a staffing plan.
- 2) Conduct a compensation and classification study.
- 3) Develop a new annual evaluation format for non-union employees.

The purpose of this agenda item is to report on the status of item 3 of the established scope of work above and to request additional direction from the Committee. The Executive Officer requests that the Committee review and provide feedback on the proposed new annual evaluation form for the Executive Officer position.

BACKGROUND

On August 20, 2024, Placer County Human Resources (HR) raised legal concerns about the existing annual evaluation form that has been in use by Placer LAFCO to evaluate the Executive Officer (Attachment A) since 2022. County HR proposed a replacement form that the County currently uses for its department heads (Attachment B).

Staff reached out to LAFCOs throughout the state, asking for examples of evaluations that have been used by other commissions to evaluate their Executive Officer. Staff received seven example Executive Officer annual evaluations from the following LAFCOs: Yolo, Los Angeles, Solano, San Diego, Butte, Fresno, and Monterey (Attachment C). As noted in Attachment C, Solano and San Diego LAFCOs do not use a formal evaluation form. Instead, the EO reports accomplishments, which are presented to the Commission during closed session.

DISCUSSION

As noted, the Personnel Committee was tasked by the Commission to develop a new annual evaluation format for the Executive Officer position, its only non-union position.

Staff compared example evaluations to pull similar questions and ideas using ChatGPT's "deep research function." The information supplied by ChatGPT can be found in Attachment D. Using ChatGPT's example as well as the example evaluations supplied by other LAFCOs, staff created a proposed new evaluation for the Committee to consider (Attachment E).

STAFF RECOMMENDATION

Through the Executive Officer, staff recommends that the Committee review the existing Executive Officer evaluation form, supplied examples, and proposed new annual evaluation form for the Executive Officer and make any revisions it deems appropriate for the Commission's consideration.

ATTACHMENTS:

- A – Existing Evaluation for the Executive Officer
- B – County HR Proposed Replacement Evaluation for Non-Union Employees
- C – Example Executive Officer Annual Evaluations from other LAFCOs
- D – ChatGPT Deep Research Information
- E – Proposed New Executive Officer Evaluation

**LAFCO OF PLACER COUNTY
EXECUTIVE OFFICER PERFORMANCE EVALUATION**

Date _____
Rating Period _____

A=Superior B=Very Good C=Satisfactory D=Needs Improvement F=Unacceptable
(Please note that the "Superior" should not be viewed as a "perfect" rating since no one is perfect. It simply means the individual is superior to most in similar positions.)

Item	Rating	Comments
Communication Skills	_____	_____
Organization of Work	_____	_____
Accuracy of Work	_____	_____
Resourcefulness	_____	_____
Knowledge of LAFCO	_____	_____
Knowledge of County	_____	_____
Willingness to Learn and Adapt	_____	_____
Leadership	_____	_____
Other	_____	_____

ESTABLISH GOALS FOR UPCOMING YEAR (use reverse side for additional goals)

1. _____

2. _____

3. _____

Signature (LAFCO Chair) _____

Signature of the person being evaluated. _____

Explanation of Terms

Communication Skills: How well does the Executive Officer (EO) communicate verbally and orally? Are staff reports clear and well-written? Does the EO speak clearly and to the point? Can the EO react quickly and appropriately to new issues and questions?

Organization of Work: How well organized is the EO? Is the EO good at prioritizing tasks? Does the work get done in a timely manner? Does the EO appropriately delegate tasks to others to assist in getting the work done?

Accuracy of Work: Are the documents prepared by the EO accurate and complete, considering limitations on time and access to the information? Are oral statements accurate?

Resourcefulness: Given LAFCO staffing and funding limitations, is the EO good at stretching those resources to achieve his or her objectives?

Knowledge of LAFCO: How well does the EO know how LAFCOs are supposed to operate? Does the EO demonstrate knowledge of the Cortese-Knox-Hertzberg Local Government Reorganization Act? Does the EO know the technical details needed to complete a change of organization?

Knowledge of County: How familiar is the EO with the county, its communities, agencies, and leaders?

Willingness to Learn and Adapt: Given that LAFCO must deal with so many different issues, is the EO good at quickly learning the essentials needed to address a new issue? Can the EO adapt to new personalities and problems?

Leadership: Because of the limited nature of Commission member participation, for LAFCO to be effective, the EO must lead the agency. How well does the EO work with the Commission in strengthening the agency and its effectiveness? How well does the EO manage staff and consultants? Is the EO proactive in informing the Commission of issues, developing LAFCO policies, and addressing community issues?

Other: What other qualities of the EO or performance concerns does the Commission want to address?



Employee ID	<input type="text"/>	Department	<input type="text"/>	Salary Grade	<input type="text"/>
Name	<input type="text"/>	Division	<input type="text"/>	Salary Step	<input type="text"/>
Job Title	<input type="text"/>	Salary Plan	<input type="text"/>	Rating Period	<input type="text"/>

TYPE OF REVIEW	Interim	Annual	MERIT ELIGIBLE	Yes	Merit Recommended
				No	Merit Not Recommended

RATING INSTRUCTIONS

Areas of strength, areas in which training or development may be needed or desired, as well as performance objectives or goals for the upcoming evaluation period should be addressed and discussed as part of the performance evaluation process. The following scale shall be used for rating the employee's performance.

RATING LEVELS

Exceeds Job Standards - Employee's work performance consistently exceeds all objectives and standards of the position, while achieving outstanding results.

Meets Job Standards - Employee's work performance consistently meets the standards of the position, demonstrates the skills needed to achieve objectives, and displays behaviors that meet or occasionally exceed job standards.

Requires Improvement to Meet Job Standards - A change in the employee's work performance is warranted to meet job standards.

Rate the employee's performance on the following factors.

PROFESSIONAL AND COURTEOUS CONDUCT	<i>Requires Improvement</i>	<i>Meets Job Standards</i>	<i>Exceeds Job Standards</i>
Actively includes and respects diverse cultures, values, and points of view			
Willingly and positively engages with and treats others with respect			
Uses tact and diplomacy to build team relationships and resolve conflict			
Consistently maintains a professional appearance, demeanor, and behavior			
Demonstrates integrity and honesty, and holds self to high standards of ethical conduct			
Assumes responsibility and accountability for decisions and actions			
COMMUNICATION SKILLS	<i>Requires Improvement</i>	<i>Meets Job Standards</i>	<i>Exceeds Job Standards</i>
Communicates verbally in a clear and concise manner			
Writes in a clear, concise, and error-free manner			
Actively listens to others for understanding			
Chooses the appropriate channel and recipients of communication			
JOB RELATED KNOWLEDGE, SKILLS, AND ABILITIES	<i>Requires Improvement</i>	<i>Meets Job Standards</i>	<i>Exceeds Job Standards</i>
Demonstrates a thorough understanding of the nature of the job assignment and requirements			
Demonstrates knowledge, skills, and abilities required for the position			
Understands, interprets, explains, and applies relevant laws, rules, and regulations			
Understands and applies the organization's mission, vision, and core values			

PROBLEM-SOLVING AND JUDGMENT	Requires Improvement	Meets Job Standards	Exceeds Job Standards
Supports the best interest of the County and customers			
Supports the best interests of the organization and LAFCO Commission			
Develops alternative solutions, provides recommendations, and selects proper course of action when appropriate			
Is proactive, self-reliant, shows initiative, and generates new ideas			
Is flexible, adaptable, and changes approach to effect positive outcomes			

WORK HABITS	Requires Improvement	Meets Job Standards	Exceeds Job Standards
Produces high-quality work			
Observes safety principles, practices, and requirements			
Exercises proper use and care of equipment and work area			
Remains productive and completes work on time and on schedule			
Demonstrates reliability and dependability			
Adheres to applicable standards, policies, and procedures			

This section is only for those employees who have direct reports and hold a supervisory or management position.

SUPERVISION AND LEADERSHIP	Requires Improvement	Meets Job Standards	Exceeds Job Standards
Holds self and others to high standards of ethical conduct			
Selects, coaches, and develops talent within the organization effectively			
Maintains high standards of performance for staff and promotes positive morale, productivity, and positive workplace climate			
Facilitates a strategic focus for the performance of staff and consultants to ensure goals are met and work products/services meet appropriate standards and expectations			
Identifies and maximizes available resources			

OVERALL SUMMARY OF PERFORMANCE	Requires Improvement	Meets Job Standards	Exceeds Job Standards
--------------------------------	----------------------	---------------------	-----------------------

In the sections below, please provide a summary of the employee's strengths and accomplishments and areas for improvement/development for the entire performance review period, including justification for any ratings noted as "Exceeds Job Standards" and "Requires Improvement" on the factors above, as well as an overall summary of performance during the rating period.

Strengths and Accomplishments/ Areas for Improvement or Development

Listed are the employee's significant strengths and/or accomplishments demonstrated during the rating period, as well as any substantial areas of improvement or actions the employee should take to further develop or improve their performance during the next evaluation cycle.

Required

Overall Summary

Includes an overall summary of the employee's performance during the rating period.

Required

EMPLOYEE ACKNOWLEDGEMENT OF REVIEW

My signature below acknowledges that I have read this performance review and that it has been discussed with me.

Signature: _____ **Date:** _____

- I do not agree with the comments in this evaluation and plan to submit comments within 30 days to be attached to this review.
- I request a meeting with the Appointing Authority to discuss the content of this review.

APPROVALS

Reviewer/Completed by: _____

Chairperson

Signature: _____ **Date:** _____

COUNTY HR EXAMPLE

ANNUAL PERFORMANCE REVIEW

I. PROCESS

1. The (employee) contract establishes a requirement for an annual performance review to occur in January.
2. Customarily the (employee) confers with the (agency) Chair prior to preparing the closed session agenda and receives input as to any requested information or supporting materials separate from the Rating Form.
3. The (agency) meets in closed session to discuss the performance review criteria and completes the (employee) Rating Form. The (agency) may request the (employee) to participate in the closed session review if desired.

II. OBJECTIVES

The objectives of the (employee) performance evaluation system include the following:

1. Provide a system to review the job performance of the (employee).
2. Encourage accountability of the (employee) through an annual review.
3. Document the expectations of the (employee) and the (agency).
4. Provide a forum for communication between the (employee) and the (agency).
5. Provide a process for goal setting for the (employee).

III. PERFORMANCE REVIEW RESULTS AND RECORD

To assure a clear record of performance, the results of the performance review are to be documented with additional (agency) actions as required.

1. Upon completion of the performance review, the results will be documented by (agency) Legal Counsel under the direction of the (agency) Chair.
2. The (agency) Chair may review the performance review with the (employee) and a copy of the performance review will be provided to the (employee) and retained in the employee's personnel file.

IV. REVIEW CRITERIA

In reviewing the (employee) performance, the following criteria, with examples of factors to be evaluated, will be equally considered by the (agency) in reviewing performance:

1. FINANCIAL MANAGEMENT:
 - Is the annual budget submittal timely and complete?
 - Is the budget managed effectively?
 - How well is financial information applied to decision-making?
 - Are costs controlled?
 - Are efforts made to enhance revenue?
2. PERFORMANCE MANAGEMENT:
 - Does the decision-making process rely on objectivity and facts?
 - Are activities managed on a timely basis and concluded effectively?

- Is there a philosophy and associated action of continuous improvement?
 - Are employees used effectively?
 - Are strategic planning concepts used?
3. PUBLIC SERVICE/STAFF DEVELOPMENT:
- Are the needs of applicants, affected agencies and concerned members of the public effectively understood and addressed?
 - Is there adequate communications with these (agency) constituents about the process and information needs?
 - Do employees have a positive constituent service attitude and approach?
 - Are employees trained in constituent service?
4. COMMUNICATION:
- Is there an atmosphere of openness and honesty?
 - Is there a high standard of quality for (agency) letters and analytical reports?
 - Are there adequate efforts to keep the (agency) , employees, and the public informed of pending issues and activities?
 - Are there good overall communications skills?
 - Is there a high level of internal and external communications?
5. LEADERSHIP:
- Is there a well-communicated Agency vision?
 - Has internal/external support been developed to accomplish the mission?
 - Is there participation in community activities?
 - Is there a reputation of openness and integrity?
 - Is there a good effort to be personally informed?
 - Are employees generally satisfied with the (employee) leadership and management?
 - Are crisis situations managed effectively?
 - Are there good efforts toward teamwork and collaboration?
 - Are interpersonal relationship skills good?
 - Are negotiation and conflict management skills utilized?
6. LEGAL COMPLIANCE:
- Are state and federal laws, mandates, and regulations adhered to?
 - Is there compliance with (agency) Policies and regulations?
 - Are agreements and other employee relations laws and regulations communicated and enforced?

Rating of the above review criteria and of goal performance will be assessed as follows using the format on Attachment A.

**Attachment A
RATING SHEET**

(employee) _____ :
Evaluator: _____
Date of Evaluation: _____

- | |
|--|
| <p style="text-align: center;">RATING STANDARD</p> <ol style="list-style-type: none">1. Unacceptable, Does Not Meet Expectations2. Acceptable, But With Deficiencies Noted3. Acceptable, Meets Expectations4. Outstanding, Exceeds Noted Expectations5. Exceptional, Exceeds All Expectations |
|--|

Criteria #1 FINANCIAL MANAGEMENT **Rating** _____

<p><i>Prior Evaluation Rating:</i> <i>Comments:</i></p>

Comments:

Criteria #2 PERFORMANCE MANAGEMENT **Rating** _____

<p><i>Prior Evaluation Rating:</i> <i>Comments:</i></p>

Comments:

Criteria #3 PUBLIC SERVICE **Rating** _____

<p><i>Prior Evaluation Rating:</i> <i>Comments:</i></p>

Comments:

Criteria #4 COMMUNICATION

Rating _____

Prior Evaluation Rating:
Comments:

Comments:

Criteria #5 LEADERSHIP

Rating _____

Prior Evaluation Rating:
Comments:

Comments:

Criteria #6 LEGAL COMPLIANCE

Rating _____

Prior Evaluation Rating:
Comments:

Comments:

Approved by the Commission for issuance at its meeting of _____, 20__

(Agency, Chair)

Receipt Acknowledged:

Dated _____, 20__

(employee signature)



Report Card on FY 2023/24 Performance Objectives

Christine Crawford, LAFCo Executive Officer

Objectives/Tasks Determined by the Commission on July 27, 2023
Year-End Performance review on June 27, 2024

1. Objective: Advance shared services and agency collaboration.

Key Results	Est. Completion Date Identified in Jul 2023	Jun 2024 Status	Notes
1.1 Coordinate review and complete the Yolo Local Agency Web Transparency Score Card for all the cities, county, special districts and JPAs within the county	Jan 2024		
1.2 Continue to facilitate the Yolo Broadband Working Group as a networking group. Also promote broadband access by including analysis in MSRs and Web Transparency scorecard	Ongoing		
1.3 Continue to coordinate the YED summits two times per year with the Planning Committee including developing topics, lining up speakers, and facilitating the events	Ongoing		
1.4 Attend and participate in County-city 2 x 2s as appropriate to advance shared services and other LAFCo related goals	Ongoing		
1.5 Assist special districts with resources for capacity building, transparency, websites, etc. as requested	Ongoing		

2. Objective: Timely MSR/SOI updates that advance shared services and government efficiencies.

Key Results	Est. Completion Date Identified in Jul 2023	Jun 2024 Status	Notes
<p>2.1 Complete an MSR/SOI for the 13 flood protection agencies:</p> <ul style="list-style-type: none"> • Knights Landing Ridge Drainage District • County Service Area 6 (Snowball) • Reclamation District 150 • Reclamation District 307 • Reclamation District 537 • Reclamation District 730 • Reclamation District 765 • Reclamation District 787 • Reclamation District 900 • Reclamation District 999 • Reclamation District 1600 • Reclamation District 2035 • West Sacramento Area Flood Control Agency ("West SAFCA") JPA 	Jun 2024		

3. Objective: Assist local agencies with improving best practices and LAFCo MSR recommendations.

Key Results	Est. Completion Date Identified in Jul 2023	Jun 2024 Status	Notes
<p>3.1 Assist FPDs with implementing MSR/SOI recommendations as requested/needed</p>	Ongoing		

3.2 Continue to monitor the GM contract status for Cacheville and Knights Landing CSDs and assess if and when consolidation options should be considered

Ongoing



4. Objective: Maintain high quality customer service to the public, local agencies, and proposal applicants.

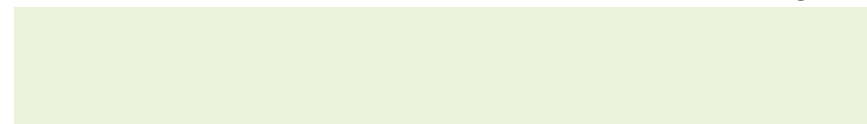
Key Results	Est. Completion Date Identified in Jul 2023	Jun 2024 Status	Notes
4.1 Process upcoming LAFCo proposals in a timely manner:			
<ul style="list-style-type: none"> • Davis - The Promenade (aka Nishi) Annexation 	TBD		
<ul style="list-style-type: none"> • Davis Wastewater Treatment Plant (WWTP) Annexation 	TBD		
<ul style="list-style-type: none"> • Woodland Research and Technology Park Annexation (350 ac) 	TBD		
<ul style="list-style-type: none"> • Woodland NE Industrial Area Annexation (613.2 ac) 	TBD		
<ul style="list-style-type: none"> • Other Woodland Annexations: <ul style="list-style-type: none"> ○ Area 1 Barnard Street Area (11.5 ac) ○ Area 2 West/Kentucky Area (8.8 ac) ○ Area 3 Permi East Street Area (76.4 ac) ○ Area 4 Sports Park Parcel (39.7 ac) ○ Area 5 Water Plant Parcel (23.5 ac) 	TBD		
<ul style="list-style-type: none"> • Elkhorn Fire Protection District Dissolution 	TBD		

5. Objective: Improve LAFCo effectiveness and efficiency by completing the following administrative projects.

Key Results	Est. Completion Date Identified in Jul 2023	Jun 2024 Status	Notes
5.1 Prepare and manage the annual FY budget, review quarterly financial reports to ensure sound budget practices	Ongoing		

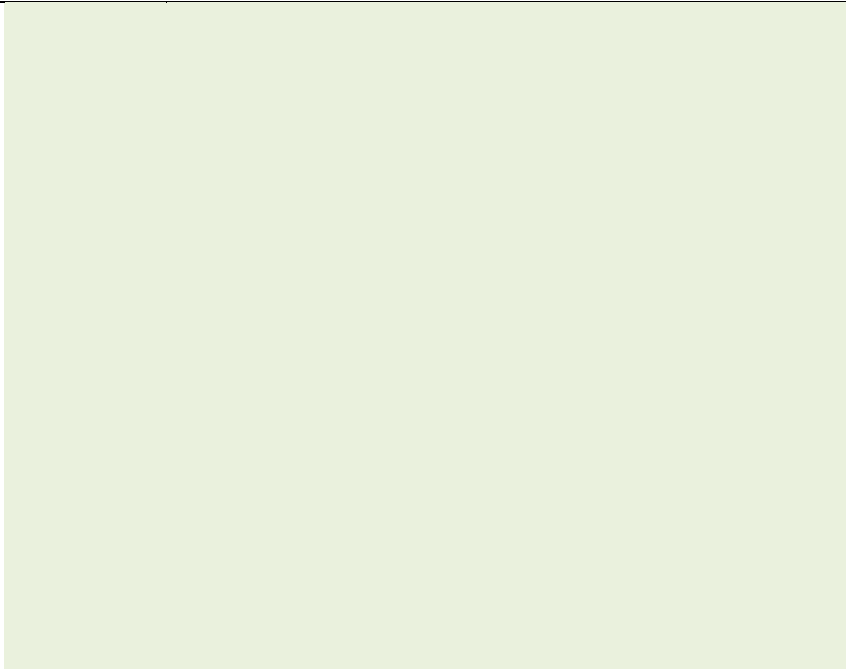
5.2 Monitor the FY 23/24 Work Plan for progress and prepare the next FYs plan

Ongoing



6. Objective: Increase professional effectiveness and influence as Executive Officer.

Key Results	Est. Completion Date Identified in Jul 2023	Jun 2024 Status	Notes
6.1 Continue to organize YED summits, attend 2x2s, etc.	Ongoing		
6.2 Coordinate with the Yolo Managers group regarding shared service programs and initiatives as needed	Ongoing		
6.3 Provide weekly LAFCo updates to the Commissioners and city/county managers	Ongoing		
6.4 Participate in CALAFCO educational offerings and networking opportunities	Ongoing		
6.5 Maintain AICP license and continuing education requirements	Ongoing		



Evaluation of Paul Novak

PLEASE RETURN BY MONDAY, May 29, 2017

Page 1 of 2

Please circle one number for each item

Description:	Unsatisfactory	Needs Improvement	Satisfactory	Very Good	Outstanding
Works collaboratively with Commissioners	1	2	3	4	5
Communicates with Commissioners in an effective and timely manner	1	2	3	4	5
Prepares agenda packets and other materials in a timely manner	1	2	3	4	5
Provides accurate and thorough staff reports	1	2	3	4	5
Presents information clearly and effectively at Commission meetings	1	2	3	4	5
Understands LAFCO statutes and local government functions	1	2	3	4	5
Manages LAFCO staff and resources responsibly	1	2	3	4	5
Manages LAFCO budgetary, accounting, and auditing functions responsibly	1	2	3	4	5
Represents LAFCO well before outside parties	1	2	3	4	5
Interacts well with local and state agencies and the general public	1	2	3	4	5
Provides leadership and vision	1	2	3	4	5
Accepts responsibility and follows through on commitments	1	2	3	4	5
Is receptive to varying perspectives, including constructive criticism	1	2	3	4	5
Serves the needs of LAFCO	1	2	3	4	5
OVERALL RATING	1	2	3	4	5

LAFCO *of Monterey County*

LOCAL AGENCY FORMATION COMMISSION OF MONTEREY COUNTY

EXECUTIVE OFFICER PERFORMANCE APPRAISAL PROGRAM

For the Annual Review Period of

X

EXECUTIVE OFFICER PERFORMANCE APPRAISAL PROGRAM

Period of X

INTRODUCTION

This appraisal program consists of five parts:

1. Performance Appraisal Rating Form (to be filled out by each Commissioner)
2. Self-Performance Appraisal (to be filled out by Executive Officer)
3. Performance Plan and Accomplishments for the Review Period (to be filled out by Executive Officer)
4. Signatures and Comments (to be filled out by LAFCO Chair and Executive Officer)
5. Job Description

INSTRUCTIONS

1. At the **Beginning** of the annual review period:
 - a. The Commission will approve Goals and Tasks (see Part 3) for six performance appraisal factors:
 - (1) Administrative and Human Resources Management
 - (2) Commission and Committee Functions
 - (3) Financial Management
 - (4) Application Processing Functions
 - (5) Government and Community Relations
 - (6) Special Studies Initiated by LAFCO
 - b. The Commission will assign Weights (see Part 1) to each performance appraisal factor. Weights will be assigned based on the relative importance of each factor. The assigned weights may vary from year to year. The total of all weights will equal 100.
2. At the **Mid-Year** point of the annual review period:
 - a. The Executive Officer will review the year-to-date progress for the six performance appraisal factors Goals and Tasks (see Part 3) and determine whether changes are needed to the work program or if the goals outlined in the work program are in line with the goals and tasks laid out at the beginning of the annual review period.
3. At the **End** of the annual review period:
 - a. The Executive Officer will fill out a Self-Performance Appraisal (see Part 2).
 - b. The Executive Officer will fill out the Accomplishments section of Part 3.
 - c. Each Commissioner will fill out a Performance Appraisal rating form (Part 1). Please use the numerical rating system listed in Part 1. The ratings range from 4 (Exceptional) to 1 (Unsatisfactory). Multiply the rating by the weight assigned to each performance appraisal factor to arrive at the score for each factor. Total the weighted scores to arrive at an overall rating. Also provide any written comments on the rating form.
 - d. Scores and comments will be summarized and presented to the entire Commission for use in conducting a performance evaluation.
 - e. The Commission Chair and Executive Officer will sign the performance appraisal form (see Part 4).

PART I: PERFORMANCE APPRAISAL RATING FORM
FOR X Period
(to be filled out by each Commissioner)

The purpose of this section is to arrive at an overall performance rating for the Executive Officer. In the chart below, please fill in the rating and weighted score for all six performance appraisal factors. Please assess the Executive Officer's performance, skills and results achieved for the review period. To assist you, please consider the information in Parts 2, 3 and 5 of this package - the Executive Officer's self-performance appraisal, the performance plan and accomplishments for the review period, and the current job description.

SUMMARY OF PERFORMANCE APPRAISAL FACTORS	RATING STANDARDS			WEIGHT For Period X	SCORE
	4=Exceptional, performance is excellent, consistently exceeding job requirements	3.5=Good, performance exceeds job requirements	3=Satisfactory, performance adequately meets requirements of job		
	2=Improvement Needed, performance partially meets requirements of job				
	0 or 1=Unsatisfactory, performance does not meet job requirements				
1. Application Processing Functions			X	20	=
2. Special Studies Initiated by LAFCO			X	20	=
3. Government and Community Relations			X	20	=
4. Commission and Committee Functions			X	15	=
5. Administrative and Human Resources Management			X	10	=
6. Financial Management			X	15	=
				100	
				TOTAL WEIGHT	TOTAL SCORE

OVERALL RATING by EACH COMMISSIONER					
Based on the total score, check the appropriate category below:					
Individual	Exceptional	Good	Satisfactory	Improvement Needed	Unsatisfactory
	400-351	350-301	300-201	200-101	100-0

Commissioner Comments: _____

Commissioner Signature and Date: _____
 (Please attach any additional comments.)

PART 2: SELF-PERFORMANCE APPRAISAL
for X Period
(to be filled out by Executive Officer)

- IA. My Most Significant Achievements During the Review Period.

- IB. Ways I Feel I Could Improve My Performance, as Well as How the Commission Can Help Me.

**PART 3: PERFORMANCE PLAN AND ACCOMPLISHMENTS
FOR X
(to be filled out by Executive Officer)**

PART 4: SIGNATURES AND COMMENTS

(to be completed by LAFCO Chair and Executive Officer)

Summary of Commissioner Comments (by Chair):

Commission Chair's Signature

Date

Executive Officer Comments:

I have reviewed and discussed this appraisal with the Commission and have made comments I feel are appropriate.

Executive Officer's Signature

Date

PART 5: EXECUTIVE OFFICER JOB DESCRIPTION

(information only)

From: Rich Seithel <rseithel@solanolafco.com>
Sent: Monday, May 19, 2025 12:06 PM
To: Michelle McIntyre <mmcintyre@placer.ca.gov>
Subject: Re: EO Evaluation Form

Michelle,

I've just been writing up accomplishments and John and Nancy present to the Commission in closed session. No form.

Rich

Rich Seithel
Executive Officer
Solano LAFCO
675 Texas St.
Suite 6700
Fairfield, CA 94533
(707) 439-3897

From: [Simonds,Keene](#)
To: [Michelle McIntyre](#)
Subject: RE: EO Evaluation Form
Date: Monday, May 19, 2025 11:24:09 AM
Attachments: [image001.png](#)
[image002.png](#)
[image003.png](#)
[image004.png](#)

Hi Michelle -

We don't have anything formal in San Diego. By practice, I simply write a self-evaluation letter, which - smartly - has gotten shorter each year.

Good luck. Placer is certainly fortunate to have you onboard!!

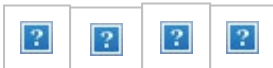
Keene Simonds
Executive Officer

San Diego County
Local Agency Formation Commission (LAFCO)

Subdivision of the State of California | Regional Service Planning
2550 Fifth Avenue, Suite 725
San Diego, California 92103-6624

T 619-321-3380

E keene.simonds@sdcounty.ca.gov



Attachment D



LAFCO Executive Officer Performance Evaluation – Best Practices and Template

¹ Performance evaluations should use objective, job-related criteria to avoid bias. Experts stress “avoiding subjectivity and basing evaluations on objective criteria” ¹. For example, SHRM advises rating employees on measurable factors (deadlines met, goals achieved) rather than vague traits ². Behaviorally anchored rating scales (BARS) help by defining each numeric score with concrete behaviors ³. For instance, a *teamwork* item might anchor “1 = makes inappropriate or rude comments” vs. “5 = encourages open communication” ⁴. These anchors make ratings transparent and defensible. The evaluation form should also allow written comments to contextualize ratings.

⁵ Public-sector guidance notes that standards should align with the Executive Officer’s job description and essential duties ⁵. It is recommended that the officer submit a self-assessment beforehand ⁶ (SHRM likewise finds self-reviews help set agreed goals ⁷). All questions should target specific responsibilities (goals, communication, compliance, teamwork) and avoid yes/no or personal-style questions that add no clear information. The sample items below cover **General Performance, Leadership, Compliance/Ethics**, and **Teamwork** using anchored scales. Each item is phrased as an observable behavior or outcome (no “trust” yes/no questions) to ensure fairness and legal defensibility.

Sample Evaluation Items

- **Achieves Strategic Goals (General Performance):** Implements LAFCO’s strategic plan and meets operational objectives. *(Rating 1–5; Comments)*
- **Program Management (General Performance):** Manages LAFCO projects and resources efficiently, keeping the Commission informed of progress. *(Rating 1–5; Comments)*
- **Communication (Leadership):** Clearly conveys information to the Commission, staff, and public; fosters open dialogue. *(Rating 1–5; Comments)*
- **Decision-Making (Leadership):** Makes timely, data-informed decisions and explains rationale clearly. *(Rating 1–5; Comments)*
- **Ethics and Integrity (Compliance):** Upholds legal requirements (e.g. Brown Act, public records) and LAFCO policies; acts with transparency. *(Rating 1–5; Comments)*
- **Financial Stewardship (Compliance):** Manages the budget and financial reports responsibly, providing accurate fiscal information to the Commission. *(Rating 1–5; Comments)*
- **Team Leadership (Teamwork):** Fosters a collaborative, respectful team environment; supports staff development and resolves conflicts constructively. *(Rating 1–5; Comments)*
- **Interagency Collaboration (Teamwork):** Builds effective relationships with local agencies and stakeholders; coordinates well on regional issues. *(Rating 1–5; Comments)*

Proposed Evaluation Form Template

Section	Evaluation Item	Rating (1-5)	Comments
General Performance	Achieves strategic goals and objectives.	___(1-5)	
	Manages programs and resources effectively.	___(1-5)	
Leadership	Communicates clearly with Commission and public.	___(1-5)	
	Makes timely, evidence-based decisions.	___(1-5)	
Compliance/Ethics	Ensures legal and policy compliance (e.g. Brown Act).	___(1-5)	
	Demonstrates ethical behavior and transparency.	___(1-5)	
	Manages budget and finances responsibly.	___(1-5)	
Teamwork & Collaboration	Encourages staff teamwork and development.	___(1-5)	
	Collaborates effectively with other agencies.	___(1-5)	

Rating Scale (for each item): 1 = Unsatisfactory (fails to meet requirements), 2 = Needs Improvement, 3 = Meets Expectations, 4 = Exceeds Expectations, 5 = Outstanding (consistently exceeds expectations). Each level should be anchored with specific examples (e.g. “5 = consistently exceeds targets, mentors others” versus “1 = often misses key goals”).

⁶ ⁷ **Self-Evaluation:** The Executive Officer should complete this form in advance as a self-assessment. Reflecting on accomplishments and challenges helps the Commission understand progress and agree on future objectives ⁶ ⁷ .

¹ ³ By focusing on specific, job-related behaviors and clear metrics, this behaviorally-anchored approach follows best practices and reduces bias. The structured rating anchors and narrative comments create a fair, consistent evaluation that is legally sound and defensible.

Sources: Public-sector evaluation guidance emphasizes clear objectives and anchored ratings ¹ ² ⁵ ³ . These sample items and form structure draw on those principles to ensure compliance and fairness in a public-agency setting.

¹ Must-Know Performance Evaluation Laws for 2025 | U.S. & Global Compliance
<https://teamflect.com/blog/performance-management/employee-performance-evaluation-laws>

2 7 Reduce the Legal Risks of Performance Reviews

<https://www.shrm.org/topics-tools/employment-law-compliance/reduce-legal-risks-performance-reviews>

3 What are Behaviorally Anchored Rating Scales (BARS) - 2024 Guide

<https://www.performyard.com/articles/what-are-behaviorally-anchored-rating-scales-bars>

4 Behaviorally Anchored Rating Scale: Examples + Guide

<https://www.aihr.com/blog/behaviorally-anchored-rating-scale/>

5 6 Chief Executive Officer Performance Evaluations: Tips for the Governing Body and CEO - LGLG

<https://www.localgovtlaw.com/chief-executive-officer-performance-evaluations-tips-for-the-governing-body-and-ceo/>



Attachment E

PLACER LAFCO EXECUTIVE OFFICER PERFORMANCE EVALUATION

RATING SCALE

- 1 = Unsatisfactory (fails to meet requirements),
- 2 = Needs Improvement,
- 3 = Meets Expectations,
- 4 = Exceeds Expectations,
- 5 = Outstanding (consistently exceeds expectations).

	Rating (1-5)	Comments
LEADERSHIP		
<i>Provides leadership and vision.</i>		
<i>Clearly conveys information to the Commission, staff, and public; fosters open dialogue.</i>		
<i>Makes timely, data-informed decisions and explains rationale clearly.</i>		
<i>Fosters a collaborative, respectful team environment; supports staff development and resolves conflicts constructively</i>		
<i>Builds effective relationships with local agencies and stakeholders; coordinates well on regional issues.</i>		
<i>Accepts responsibility and follows through on commitments.</i>		

	Rating (1-5)	Comments
GENERAL PERFORMANCE		
<i>Implements LAFCO's strategic plan and meets operational objectives.</i>		
<i>Manages LAFCO projects and resources efficiently, keeping the Commission informed of progress.</i>		
COMPLIANCE/ETHICS		
<i>Upholds legal requirements (e.g. Brown Act, public records) and LAFCO policies; acts with transparency.</i>		
<i>Understands LAFCO statutes and local government functions</i>		
<i>Manages the budget and financial reports responsibly, providing accurate fiscal information to the Commission.</i>		

STRENGTHS AND ACCOMPLISHMENTS

Please list the strengths and accomplishments of the Executive Officer.

AREAS FOR IMPROVEMENT/DEVELOPMENT

Please list actions the Executive Officer could take to develop or improve their performance.

ADDITIONAL COMMENTS

Any other information that you wish for the Executive Officer to know.

EXECUTIVE OFFICER ACKNOWLEDGEMENT OF REVIEW

My signature below acknowledges that I have read this performance review and that it has been discussed with me.

Signature: _____ *Date:* _____

- I do not agree with the comments in this evaluation and plan to submit comments within 30 days to be attached to this review.*

- I request a meeting with the Commission to discuss the content of this review.*

EVALUATION APPROVAL

Completed by Commissioner: _____ **Date:** _____

LAFCO Chair

Signature: _____ **Date:** _____