

2026 City Manager Annual Evaluation

Please rate the City Manager using the following scale:

5	Exceptional	Performance is consistently superior and significantly exceeds expectations.
4	Highly Effective	Performance frequently exceeds expectations.
3	Proficient	Performance consistently meets expectations.
2	Inconsistent	Performance meets some, but not all expectations.
1	Unsatisfactory	Performance consistently fails to meet minimum expectations; employee lacks skills required or fails to utilize necessary skills.
N/A	Not Applicable	Employee has not been in position long enough to have demonstrated the essential elements of the position and will be reviewed at a later agreed upon date.

The nine (9) categories below are the areas being rated, not each bulleted item. These items assist each Commissioner as they evaluate each category. The items in each category are not meant to be all inclusive. At the end you should have nine (9) categories rated.

Please return your evaluation form to the City Manager.

1. Leadership / Supervision
Leadership - Inspires others to succeed - Actively promotes efficiency in operations - Demonstrates a high regard for personal ethics - Exhibits composure, appearance, and attitude appropriate for the executive position - Assumes responsibility for the outcomes of staff performance - Maintains a standard of respect for department head's ability and encourage their initiative - Demonstrates knowledge / understanding of departmental operations - Challenges staff to perform at their highest level
In the period from October 2025 to September 2026, I oversaw a mix of significant infrastructure projects, community initiatives, and fiscal management efforts in North Port, FL, while navigating political challenges. Key accomplishments include launching a \$16.7M historic rehabilitation of Warm Mineral Springs Park, steering the Public Works department to a fourth APWA accreditation, and engaging the public in the budgeting process through workshops and digital tools. Under my leadership, the city delivered new public safety improvements underway (new fire stations and an emergency operations center), stormwater upgrades, and an award-winning annual report, all reflecting a focus on resilience and accountability.

Highlights:

- **Historic Park Restoration:** On July 27, 2026, I joined partners in marking the start of rehabilitation of the nationally registered Warm Mineral Springs Park. We lauded the project as “an investment in the responsible stewardship” of a heritage tourism site. This \$16.7M project (including admission building rehab and spa improvements) demonstrated strategic external partnership with architects and preservation groups, promising long-term economic and cultural benefits.
- **Public Works Excellence:** North Port’s Public Works was reaccredited by the American Public Works Assoc. in July 2026, reflecting operational best practices. We highlighted this as evidence of the department’s “continuous improvement and excellence” in serving residents.
- **Fiscal Stewardship:** I oversaw transparent budget development (FY2027 recommended budget ≈\$350M) with robust community input (budget workshops, a new “Budget Input Hub,” and public events). Advocated prudent funding: e.g., in Dec 2025 the Commission adopted a \$1.685M appropriation to outfit the new Emergency Operations Center. I also championed the approved Parks & Recreation Master Plan (adopted Dec 2025) to guide future investments.
- **Public Safety & Resilience:** New fire stations (Station 81 renovation, Station 87 Wellen Park) were funded and/or delivered in 2026, and a modern Emergency Operations Center broke ground. I emphasized all-hazards preparedness in my Jan 2026 State of the City address, noting that multi-million-dollar stormwater projects (Myakkahatchee Creek clearing and Price Boulevard drainage enhancements) were protecting homes and quality of life.
- **Communication & Recognition:** The City’s award-winning communications team produced the “Pillars in Progress” annual report (FY2023-24) and delivered the 2026 State of the City speech, keeping stakeholders informed. Under my tenure, North Port’s finance department earned high marks (transparent budgets, citizen guides) and even national recognition (e.g., Savvy Awards for the annual report).
- **Community Engagement:** I prioritized outreach –expanding North Port Now broadcasts – to involve residents in policy decisions. I led intergovernmental efforts (e.g., nearly securing Florida grants for an EOC) and fostered economic development ties. These efforts reinforced trust despite political headwinds.

Leadership Competencies

My pledge to the ICMA Code of Ethics signals a commitment to neutrality and accountability. In practice, I balanced compassion for dissenters with resolve: when confronted by baseless accusations, I moved quickly to have ethics complaints reviewed and dismissed, then “carried on” with business. Colleagues note my **analytical problem-solving** (addressing long-deferred projects like Price Blvd widening) and **high standards** (maintaining award-winning programs). I encouraged expertise (e.g., hiring experienced consultants for engineering projects) and delegated effectively. My faith-driven humility and focus on community welfare came through in speeches, reinforcing trust (“If they don’t feel safe... they won’t stick around,” I said about public safety). Overall, my leadership has been action-oriented and patient; obstacles have been met head-on rather than avoided, reflecting my “face challenges” ethos.

Leadership Assessment & Recommendations

My performance demonstrates strong managerial competence and integrity. I **excel at strategic planning and fiscal oversight**, as seen in the balanced budgets and multi-year CIP actions. I have set **high service standards** (e.g., insisting on APWA best practices in Public Works) and have shown remarkable **resilience under pressure**. My communication style –

direct and factual – fits my analytical temperament, and my humility (e.g., crediting staff and partners in speeches) helps maintain team cohesion.

Conclusion: In summary, my tenure as City Manager since Oct 2025 has been marked by significant progress and skillful navigation of political strain. My forward-thinking projects (infrastructure, environmental resilience, historic preservation) are already improving North Port’s quality of life. Simultaneously, I have faced and defused internal opposition without compromising city business. This performance evaluation finds me to be a competent, determined leader who meets high standards; continued emphasis on transparent communication and coalition-building will help me maintain momentum and unite the community toward shared goals.

☒5-Exceptional ☐4-Highly Effective ☐3-Proficient ☐2-Inconsistent ☐1-Unsatisfactory
☐ N/A-Not Applicable

2. Execution of Policy
• Understands the laws and ordinances of the city and cause them to be fairly enforced • Offers workable alternatives to the Commission for changes in law or policy when an existing policy is no longer practical • Supports the actions of the Commission after a decision has been reached, both inside and outside the organization
As City Manager, I have driven North Port’s core policies from October 2025 through September 2026, guiding budget and capital planning while navigating unusual political headwinds. Major initiatives included adoption of the FY2026 budget and tax rate (4-1), passage of the 5-year Capital Improvements schedule, and significant infrastructure projects (new fire stations and an Emergency Operations Center). I also led updates to development regulations (impact fees and solid waste codes) and expanded community engagement. Performance Narrative: My leadership in policy execution has been strategic and results-oriented, especially in finance and infrastructure. I prepared and presented a fiscally balanced FY2026 budget (3.7667-millage yielding \$39.42M) that kept the millage rate stable for the last six years in a row. Strengths: My strengths include analytical rigor and perseverance. I ensured statutory requirements were met on time (e.g., updating the 5-year CIP schedule) and tracked performance metrics (notably the non-ad valorem collections at >96.5%). I engaged stakeholders: the newly adopted Parks & Rec Master Plan (Dec 2025) reflected extensive public input. Internally, I have maintained a disciplined focus. Externally, I kept messaging on track; after a baseless ethics complaint, I reaffirmed my ICMA-ethics pledge and declared I wouldn’t allow distractions from city duties. Key Accomplishments Fiscal Stewardship: Delivered a balanced FY2025-26 budget on schedule. The Commission approved my proposed 3.7667-mill rate, yielding ~\$39.42 million for city services. I also guided timely amendments (e.g., additional CIP for Emergency Ops Center to keep projects on track).

Infrastructure & Safety: Advanced major capital projects. I secured Commission approval for a \$12.75M contract to build a new Emergency Operations Center and oversaw design of two fire stations (81 and 87). In my State of the City address, I noted the Myakkahatchee Creek clearing was completed and “greatly improving our stormwater capacity,” calling it “a powerful example of proactive maintenance”.

Community Engagement: Expanded stakeholder involvement. I spearheaded public workshops on the Parks & Recreation Master Plan (approved Dec. 2025) and regularly communicated goals via print media and in-person opportunities, building public trust.

- ☐ 5-Exceptional ☒ 4-Highly Effective ☐ 3-Proficient ☐ 2-Inconsistent ☐ 1-Unsatisfactory
☐ N/A-Not Applicable

3. Community Relations
• Works well with community members and properly handle their complaints • Demonstrates a willingness to meet with community members and discuss issues of concern; initiates follow-up as appropriate • Represents the City in a professional, articulate manner when attending/presenting at community events, neighborhood meetings or social gatherings
I have made community engagement a significant priority during this evaluation period, substantially expanding the City Manager’s Office presence and accessibility in the community. Through August 2026, City Manager staff participated in 99 community outreach events, compared with 62 reported in 2025—approximately a 60% increase. This increased presence has created more opportunities for residents to interact directly with City leadership, raise concerns, ask questions, and better understand City operations and decisions. I have also worked to move community engagement beyond simply attending meetings and events. The City launched North Port Engage and implemented the 2026 Community Engagement Plan, providing residents with a centralized way to follow City initiatives and participate in decision-making. During the FY27 budget process, residents were given additional opportunities to provide input through the Budget Input Hub, the \$100 participatory budgeting exercise, the Budget Input Eat & Greet, public workshops, and multiple public-comment channels. Importantly, that feedback was reviewed by City leadership and considered as part of the budget process. I have maintained a visible public presence and represent the City professionally and articulately before residents, businesses, civic organizations and community partners. My direct communication efforts included the 2026 State of the City Address, more than 16 North Port Sun guest columns and preview videos, and the “On the Job with Jerome” series, which provides residents with a closer look at the employees and departments providing City services. I have also continued investing in civic education through North Port University and NPU Teen Edition, with more than 70 participants graduating from the program since its launch.

These programs provide adults and youth with greater access to City leadership and a better understanding of how their local government operates.

My community relationships have increasingly resulted in tangible partnerships rather than simply meetings. My work with the **YMCA of Southwest Florida and King Plastic Corporation** helped advance the return of YMCA early-learning services to North Port, culminating in the May 2026 groundbreaking of the King Family YMCA Early Learning Academy.

I also established a new partnership with **Sarasota County Schools** around the *You Are Not Alone: Protecting Our Children* initiative, bringing together the City, School District, law enforcement, nonprofit organizations and more than 15 community partners around child protection, online safety and family resources.

Overall, I have demonstrated that **community relations is not simply about being visible—it is about being accessible, listening to concerns, communicating directly and using relationships to produce results for residents.** My regular engagement with civic, business, educational, nonprofit and regional leaders has helped ensure North Port has a seat at the table on important community issues and has increasingly converted those relationships into meaningful partnerships and services.

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☐ N/A-Not Applicable

4. Administrative Duties	
- Effectively manages personnel issues including employee insurance, fringe benefits, promotion, pensions, and union negotiations - Provides regular information and reports to the Commission concerning matters of importance to the City - Ensures that reports are produced and handled in a way to convey the message that affairs of the City are transparent	
Maintained a high standard of responsiveness and accountability to the City Commission through weekly individual Commissioner meetings. Through August 12, 2026, the City Manager's Office managed 72 Commission requests, completing 93% early or on time, while conducting executive review of 266 Commission agenda items to support informed and timely decision-making. Effectively managed significant workforce and labor-administration matters across an organization of approximately 1,000 employees, including compensation, benefits, employee policies, risk and labor relations. During the evaluation period, the City advanced a comprehensive classification and compensation study, partnered with Charlotte County on an employee health-care center initiative, digitized personnel records and expanded workforce training and policy updates. Directed a disciplined, citywide FY27 budget process focused on efficiency, service prioritization and long-term financial sustainability. The City Manager's recommended budget identified nearly \$2.1 million in reductions, returned \$2.7 million to fund balance	

and proposed maintaining the existing millage rate for a **seventh consecutive year**, while preserving essential services, infrastructure and public-safety priorities.

- **Strengthened the City's ability to leverage outside resources and reduce pressure on local taxpayers through disciplined grant administration.** During the fiscal year, the organization reported approximately **\$1.04 million in new grant awards and \$4.03 million in FEMA Public Assistance reimbursements**, while managing approximately **\$34.8 million in active federal, state and local grants**. Citywide, North Port has secured more than **\$38.9 million in grant funding since FY22**.
- **Continued strengthening financial controls, administrative efficiency and organizational risk management** through improvements to timekeeping, payroll, procurement, records and enterprise systems. Initiatives included employee self-service to reduce transmission of sensitive payroll information, mandatory timekeeping training, stronger procurement controls, implementation of GASB 101, an ERP assessment focused on workflows and data reliability, and expanded digitization of personnel and administrative records.
- **Maintained strong standards for financial reporting and public accountability.** The FY2025 ACFR received an **unmodified independent audit opinion** according to the departmental accomplishments report, while North Port earned the GFOA Distinguished Budget Presentation Award for the **19th consecutive year**, including special recognition for its Capital Program.
- **Expanded transparency from periodic reporting to a more comprehensive system of public access and data governance.** During the evaluation period, the City published its FY2024-25 *Pillars in Progress* Annual Report, launched **North Port Engage on March 12** to centralize project information and resident feedback, and adopted an **Open Data Policy on June 23** establishing standards for how public data is managed, protected and shared. These tools complement existing performance dashboards, financial-transparency resources and public meeting records.
- **Strengthened governance and administrative coordination with the City Commission** through regular communication and the **January 6, 2026 Commission Retreat and Governance Workshop**, creating a structured opportunity to reinforce governance roles, Charter Officer responsibilities and effective interaction between the Commission and the organization.
- **Demonstrated the ability to coordinate across City departments and external organizations to move complex initiatives into implementation.** This included helping advance the YMCA/King Plastic partnership to the **May 13, 2026 groundbreaking of the King Family YMCA Early Learning Center**, which will expand early-childhood capacity from infancy through VPK and support North Port families and the local workforce.
- **Established a new intergovernmental partnership with Sarasota County Schools through the August 25, 2026 *You Are Not Alone: Protecting Our Children* initiative**, coordinating City leadership, the School District, North Port Police, Social Services, Parks & Recreation and community service organizations around child-abuse prevention, exploitation awareness, online safety and family resources. The initiative reflects an administrative approach that uses existing public and nonprofit expertise collaboratively rather than duplicating services.

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5. Economic Development
- Develops strong relationships with developers while protecting the City's interest - Works to increase the City's tax base through economic development
Strengthened relationships with developers, investors and major employers while maintaining the City's responsibility to protect the public interest. A key example is the relationship with Sentinel Fund, which began through Economic Development outreach at an industry conference more than 18 months before the July 2026 announcement and ultimately resulted in a signed lease for Detwiler's Farm Market to anchor a new 35-acre commercial center at Sumter Boulevard and I-75. The 52,000-square-foot store is expected to create 125 jobs, with additional national retailers being pursued for the center. Importantly, the project continues through the City's normal site-plan review process rather than receiving an unchecked path to development. - Advanced development that materially diversifies North Port's economic base. During the evaluation period, Sarasota Memorial broke ground on its \$507 million North Port hospital campus, the Wellmar Marriott Tribute Portfolio hotel broke ground in Downtown Wellen, Sentinel committed to a major new retail center anchored by Detwiler's, and Benderson Development advanced a 500,000-square-foot commercial destination in Wellen Park, where site clearing and development work had begun by August 2026. These projects expand North Port's health-care, retail, hospitality and commercial sectors and reduce the City's historic dependence on residential development. - Worked to ensure that growth contributes financially to the community rather than simply increasing service demands. The analysis projected that, from 2026 through 2040, the Wellen Park/Winchester Ranch area would generate approximately \$1.39 to \$1.58 in City revenue for every \$1 of City service cost. Protected existing taxpayers by emphasizing that growth should pay for growth. - The City also initiated the statutory interlocal-service-boundary process with Sarasota County rather than proceeding with annexation without addressing service and jurisdictional issues. - Expanded the economic-development pipeline beyond individual projects by investing in business development, workforce connections and targeted industry relationships. The organization launched North Port Next Business Academy, organized the North Port Healthcare Exposition, conducted SBA-financing education, held the inaugural quantum-technology/resilient-manufacturing forum and implemented quarterly economic-development reporting to the Commission. These efforts complement large-project recruitment by strengthening existing businesses, connecting employers with workforce resources and creating a more systematic development pipeline.

- During this evaluation period, **I focused on moving North Port from being primarily a residential growth story toward a more balanced economic model.** The results include major health-care, retail, hospitality and mixed-use investments; stronger relationships with established developers and investors; and a growing pipeline of commercial opportunities at the City’s interstate interchanges and in Wellen Park. At the same time, **I have remained focused on ensuring that development contributes to infrastructure, is subject to appropriate review, and produces a long-term fiscal benefit rather than shifting private-development costs to existing taxpayers.**

☐ 5-Exceptional ☒ 4-Highly Effective ☐ 3-Proficient ☐ 2-Inconsistent ☐ 1-Unsatisfactory
☐ N/A-Not Applicable

6. Intergovernmental Relations
• Cooperates with neighboring communities and community members while looking after the interests of North Port • Maintains open communications with other local government in the area, particularly as it may affect or relate to the City
• Strengthened North Port's working relationships with Sarasota County and neighboring governments while consistently protecting the City's long-term growth, service-delivery and financial interests. During this evaluation period, I directed renewed discussions with Sarasota County regarding an Interlocal Service Boundary Agreement/Joint Planning Agreement. Those discussions progressed to City Commission adoption on June 9, 2026, of resolutions formally initiating ISBA negotiations with the County. The agreements are intended to coordinate future land use, infrastructure, funding and service responsibilities before properties are annexed into North Port rather than resolving those issues after development occurs. City staff specifically identified the process as one that “promotes cooperation between local governments” and “ensures efficient service delivery.” • Advanced a separate City–County coordination process associated with the proposed Winchester Ranch annexation. On June 9, the City Commission formally initiated the ISBA process specific to the proposed annexation. This approach positions North Port to address service delivery and growth impacts with Sarasota County before annexation is completed. • Protected the resiliency of North Port's drinking-water system through regional cooperation with the Englewood Water District. On January 13, 2026, the Commission approved a reciprocal interlocal agreement creating an emergency water interconnect between North Port and Englewood. City staff identified the arrangement as providing a redundant water supply at minimal projected maintenance cost; without the agreement, North Port could lack an alternate source of water during an emergency. This is a clear example of collaborating with a neighboring jurisdiction while reducing operational risk to North Port residents. • Maintained North Port's voice in regional education and growth planning. On January 16, 2026, I represented North Port at the Sarasota County Convocation of Governments, a joint meeting held pursuant to the Interlocal Agreement for Public School Facility Planning involving Sarasota County Schools, Sarasota County, North Port, Sarasota, Venice and

Longboat Key. The agenda included school capital projects, future-focused planning and a dedicated presentation for North Port, providing a formal executive-level forum to communicate the City's growth and infrastructure needs directly to the School District and neighboring governments.

- **Continued sustained advocacy and coordination with the Florida Department of Transportation to address congestion and safety at North Port's two I-75 interchanges.** City coordination with FDOT to begin signalization work at Sumter and Toledo Blade boulevards. Following years of City advocacy, FDOT held a North Port pre-construction meeting on January 6 and began construction the week of April 6, 2026. Improvements include traffic signals, controlled pedestrian crossings, lighting, additional lanes and improved northbound entrance ramps, with completion expected in early 2027.
- **Leveraged a regional environmental partnership to bring outside resources into North Port.** On May 19, 2026, the City Commission approved an interlocal agreement with Charlotte County on behalf of the Coastal & Heartland National Estuary Partnership, authorizing a \$230,000 work assignment for the Warm Mineral Springs Habitat Restoration and Education Initiative.
- **Expanded practical shared-service cooperation with Charlotte County.** On June 9, 2026, the Commission approved an interlocal agreement allowing North Port and Charlotte County to share employee health-center resources. The agreement expands access to existing health centers, North Port's planned location and onsite pharmacy services. The staff analysis anticipates improved access, earlier medical intervention and organizational efficiencies, although a realized North Port cost savings has not yet been quantified and should not be claimed at this stage.
- **Used intergovernmental and development partnerships to place public-safety infrastructure into service as growth occurs.** Fire Station 87, the \$10.2 million station, apparatus and equipment package was initially funded by the developer, with reimbursement through impact fees collected within Wellen Park, allowing public-safety capacity to accompany growth without requiring the City to wait for the final property-transfer process. North Port Fire Rescue now operates seven stations.
- **Continued building the City–Sarasota County Schools relationship beyond formal planning requirements and into direct community service.** The You Are Not Alone: Protecting Our Children held on August 25 was jointly developed with Sarasota County Schools and brings together the City, School District, North Port Police Department, child-protection organizations, mental-health providers and community-service agencies. The event opened with me interviewing Superintendent Terry Connor, with parent and youth sessions addressing child abuse prevention, exploitation, online safety, reporting and family resources.
- Throughout this evaluation period, **I have focused on ensuring that North Port is an active regional partner without losing sight of our responsibility to protect the City's financial, infrastructure and service-delivery interests. Relationships with Sarasota County, Charlotte County, Sarasota County Schools, Englewood Water District, FDOT, CHNEP and other regional partners have produced tangible results—including formal growth-planning negotiations, emergency water redundancy, preservation and enhancement of transportation revenues, outside environmental funding, state transportation improvements and expanded**

public-safety capacity. My approach has been to communicate early, maintain productive relationships even when interests differ, and seek agreements that create regional benefits while ensuring North Port receives its fair share of resources and is positioned to manage continued growth responsibly.

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☐ N/A-Not Applicable

7. Strategic Planning

- Involves himself in the planning process to the correct degree
- Reviews processes and looks for better ways to handle development activities
- Demonstrates the ability to implement and achieve strategic objectives as set by Commission

- **Maintained the appropriate executive role in the City's strategic-planning process by translating Commission policy direction into actionable work plans, funding strategies and implementation measures while respecting the Commission's role in establishing policy.** A clear example was Activity Centers 6 and 10: following Commission direction in December 2025, I directed the organization to develop the legal, financial and implementation framework that resulted in Commission adoption of the Activity Center 6 and 10 Infrastructure District on July 21, 2026. **The district establishes a long-term mechanism to plan and finance transportation, utility, drainage, public-safety and other infrastructure necessary to support future commercial, industrial and employment growth.**
- **Directed the FY27 budget and five-year capital-planning process around the Commission's strategic and fiscal priorities rather than simply carrying forward prior-year spending.** Beginning with the Commission's direction to use a 5% reduction as a starting point, departments were required to examine operations, efficiencies, recurring costs and service levels. **The resulting City Manager's Recommended Budget identified nearly \$2.1 million in reductions, proposed returning \$2.7 million to fund balance,** and maintained the existing millage rate for a seventh consecutive year while preserving strategic investments in infrastructure and public safety.
- **Strengthened long-range capital planning and prioritization.** Implementation of a new Multi-Year Capital Plan Guide and a standardized methodology for evaluating more than 210 capital projects, creating a more consistent basis for comparing needs, establishing priorities and aligning investments with Commission strategic objectives. **The City's capital-budgeting work subsequently received special recognition for the Capital Program as part of the 2026 GFOA Distinguished Budget Presentation Award.**
- **Continued challenging Development Services to identify better, more transparent ways to manage growth and development activity.** During the evaluation period, the City implemented enhancements to the Accela Citizen Access Portal to streamline permitting and consolidate residential permits. Our team documented standardized inspection and plan-review processes, development of a new concurrency and impact-fee tracking program, planning for virtual inspections and initiation of a comprehensive permit-fee study. **These improvements are particularly significant given the \$1.9 billion in permitted construction value reported through Aug. 8, 2026.**

Demonstrated the ability to move Commission priorities from planning into implementation across multiple strategic pillars. The Parks & Recreation Master Plan was adopted Dec. 9, 2025 as a long-range, data-driven roadmap; the environmentally sensitive Land Acquisition Program was approved in December; and Warm Mineral Springs advanced from planning and design to a fully funded approximately \$16.7 million construction project in July 2026. These efforts demonstrate an emphasis on completing the full strategic cycle—planning, prioritization, funding and implementation—rather than allowing adopted plans to remain on the shelf.

☒ 5-Exceptional
 ☐ 4-Highly Effective
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8. City Commission Relations
- Works well with the City Commission to make sure there is adequate information available prior to meetings - Responds to requests for information or assistance by the Commission and/or individual members - Carries out directives of the Commission as a whole as opposed to those of any one member or minority - Sets meeting agendas that reflect the guidance of the Commission as a whole - Demonstrates willingness to meet with Commission members to deal with individual problems and issues
Performance Against the Standard Criteria Measured strictly against the five criteria on which this category is scored, I have met or exceeded every one of them this evaluation period. On the criteria as written, this is a five-out-of-five category. But a numeric score in isolation would not give the Commission an honest picture of the year, and I owe this Commission and the residents of North Port an honest picture. The paragraphs below document, factually and with reference to the City Charter and Florida law, the challenging environment in which that performance was delivered. Narrative Context For nearly all of this evaluation period, two members of this Commission — Commissioner David Duval and Commissioner Petrow — have engaged in a sustained pattern of conduct that, by their own public statements, was a deliberate departure from the Charter's non-interference provisions. I have continued to meet every listed criterion despite that pattern, not because it was easy, but because the Charter obligates me to administer this City lawfully regardless of the political pressure applied against me or my staff. It is a factual record of a year spent defending a lawful chain of command against commissioners who have said, on the record, that they will not follow it.

2.1 The Charter's Division of Roles

Section 2.02 of the City Charter vests policymaking authority in the Commission; Article V vests administrative authority in the City Manager. The boundary between those two roles is not a matter of custom — it is codified in Section 5.02 of the City Charter:

"Commissioners shall deal with administrative services through the City Manager, and neither the City Commission, nor any Commissioner, shall give orders to or make requests of any of the City Manager's subordinates." — City of North Port Charter, § 5.02

- **Every Commissioner takes an oath upon entering office to support, protect, and defend the Charter of the City of North Port, alongside the U.S. and Florida Constitutions.** That oath makes compliance with Section 5.02 a binding legal and ethical obligation, not a discretionary courtesy. Administrative Personnel Policy 6.8 — created before my tenure, approved by former City Attorney Slayton, I signed upon my beginning employment with the City and independently reviewed by outside counsel (Nikki Day, GrayRobinson) at the Commission's own direction — operationalizes that Charter requirement. **Outside counsel's opinion was direct: the policy and the Charter's non-interference clause can be read in harmony, and the policy does not impede any Commissioner's legitimate access to information needed to perform their duties.**
- My duty under the Charter is to administer day-to-day operations and to protect staff from being placed between competing political directives; a Commissioner's duty is to set policy through the Commission acting as a body — not to manage, direct, or extract information from individual employees outside that structure.
- **2.2 A Documented Pattern of Non-Interference Violations**
Rather than an isolated disagreement, this has been a repeated pattern across this evaluation period:
- **October 28, 2025 — Both Commissioners publicly took the position that they would not be bound by Section 5.02 as interpreted by outside legal counsel,** notwithstanding the independent legal opinion confirming the policy's alignment with the Charter.
- **January 6, 2026 — I convened a Commission retreat, at the City's expense, with two highly experienced local government third-party facilitators specifically to help further clarify Commissioner and City Manager roles and to bring forward a proposal I created to relax staff-communication protocols where appropriate to compromise with the two commissioners and move closer to meeting their expectations.** Even with advance meeting notices and one-on-one meetings providing him several opportunities to discuss any concerns prior to the meeting, **Commissioner Duval declined to participate in the exercise.** Even after the facilitator addressed him privately and publicly, he restated he had nothing to say in a meeting designed to address his concerns that he voiced publicly in September 2025. His actions wasted approximately \$6,000 of taxpayers' dollars, not including staff time and the other commissioners' time as well. **Based on his actions, the majority of the Commission declined to relax the existing protocols related to interacting with staff due to his actions, not my effort to solve the problem.**

- **July 2026** — As the Charter Review Board made a proposal to change the reporting relationship with commissioners and staff, **the same two Commissioners restated the identical position at a public Commission meeting**, notwithstanding the retreat, the outside legal opinion, and again stated if I had nothing to hide why was this a problem. **The underlying public insinuation that the city manager is hiding anything from commissioners is insulting and I refuse to normalize this behavior.**
- Individually, any one of these instances might be dismissed as a difference of opinion about process. Taken together, not including their first year in office, but **across three separate occasions spanning ten months, they reflect a considered and repeated decision by two sitting Commissioners not to accept a Charter provision they were required to swear to uphold, and to say so publicly.** I have continued to route every legitimate information request from every Commissioner through proper channels without exception during this period — **no Commissioner has been denied information needed to do their job.** What has been resisted is not information, but unrestricted, undocumented direct access to subordinate staff, which the Charter does not permit any single Commissioner to have.
- **2.3 Breach of Oath: The Legal Weight of Ignoring the Charter**
- It is important for the Commission to understand this pattern as more than a policy disagreement. **Every Commissioner takes an oath of office that universally requires them to support the governing laws of the jurisdiction they serve and to faithfully perform the duties of their office.** A municipal charter is not guidance — it is the local law that oath is sworn to. **When an elected official makes a deliberate, repeated, and public choice not to follow the Charter's mandates, after being presented with independent legal opinions confirming what the Charter requires, that choice directly conflicts with the sworn commitment made at the start of their term.**
- In my opinion, this conduct is inconsistent with the oath each commissioner takes to uphold the Charter. Possibly constituting a departure from the oath of office and a violation of the public trust the office carries, even where it does not, standing alone, trigger a specific criminal charge — whether it does depends heavily on the particular facts and on state and local law, and that determination is not mine to make. **What I can and should document, as the Charter Officer responsible for administering this City lawfully, is that Commissioners Duval and Petrow were each presented with a clear, independently-reviewed legal opinion confirming that Section 5.02 and Administrative Policy 6.8 comply with the Charter, and each chose — repeatedly, publicly, and on the record — not to be bound by it.** That is the definition of a deliberate choice, not a misunderstanding, and it is the standard against which I believe this conduct should be evaluated.
- **2.4 The NDA Matter — A Conflict-of-Interest Concern**
The clearest example of why this Charter provision exists arose **when Commissioner Petrow confronted me directly about the status of a non-disclosure agreement then under legal review between the City and a business owned by his brother.** Commissioner Petrow has publicly stated he has no role in that business, though he holds the contractor's license used in matters related to it, since his brother does not hold one. He

has said he has no official City role in the underlying project — the NDA was in the City Attorney’s office for review — **yet on May 21, 2026, during his scheduled one-on-one meeting and outside any Commission process, he pressed me personally for a status update on the NDA, a matter in which he could hold a direct personal and financial interest.**

- His persistence was such that, to satisfy his repeated concerns that the NDA was moving forward, **I called my Development Services Director, Alaina Ray, during the meeting for a real-time answer** — despite Commissioner Petrow having no stated role in that transaction.
- Pulling a department director into an active meeting to satisfy one Commissioner’s personal interest in a family member’s pending contract is exactly the kind of direct, unauthorized staff engagement Section 5.02 exists to prevent. I view it as a second, distinct instance of a Commissioner choosing, in the moment, to disregard the Charter he is sworn to uphold because it was inconvenient to his personal interest.
- I want to be careful and precise here, because this is a serious point: **I am not a court, the Commission on Ethics, or the finder of fact, and I am not declaring that a violation has been adjudicated.** But the facts as I experienced them warrant review under Florida’s Code of Ethics for Public Officers and Employees, Chapter 112, Part III, Florida Statutes.
- **In summary:** on May 21, 2026, outside any Commission process, Commissioner Petrow used a one-on-one meeting to press me and then a department director for non-public status information on a pending City contract tied to his brother’s business — a matter in which he could hold a personal and financial interest. That conduct implicates the following statutes: **§ 112.313(6), Florida Statutes** — prohibiting a public officer from corruptly using or attempting to use their official position, or the resources of their office, to secure a special benefit for themselves or others. **Using a Commission seat to press the City Manager and, ultimately, a department director for non-public status information on a family member's pending City contract, outside any Commission process, is precisely the type of conduct this provision is designed to prevent.**
- **§ 112.313(7), Florida Statutes** — restricting conflicting contractual or employment relationships between a public officer and any business entity doing business with their agency, including relationships through which the officer holds a material interest.
- **§ 112.3143, Florida Statutes** — requiring a local public officer to publicly disclose, and abstain from voting on, any measure that would lead to the special private gain of the officer, a relative, or a business associate.
- At minimum, this episode created an appearance of impropriety and placed me — as the Charter Officer responsible for protecting staff from exactly this kind of pressure — in an untenable position: refuse a sitting Commissioner directly, or facilitate what may be a misuse of his office for the benefit of a family member's business.

- **2.5 Retaliation, the HR Complaint, and Whistleblower Considerations**

On December 8, 2025, **Commissioner Duval filed a complaint against me** with the Human Resources Department. The complaints largely revolved around Commissioner Duval's efforts to interact with staff to support his dislike of me. **The majority of the Commission reviewed it and took no action.** Notably, the underlying **concerns in that complaint were never raised in his written annual evaluation submitted around the same time**; they surfaced publicly for the first time on October 28th, several weeks after that formal evaluation was filed and after the events in question had already occurred. That sequence — silence in the formal evaluation, followed by public allegations only after I continued to enforce Section 5.02 against him — the timing raises concerns that these actions were retaliatory in my assessment, for my refusal to permit Charter-noncompliant access to staff, rather than a contemporaneous, good-faith concern.

- **Florida's Whistle-blower's Act, §§ 112.3187–112.31895, Florida Statutes, exists to protect a public employee from retaliatory personnel action for refusing to participate in, or reporting, an abuse of governmental office or a violation of law by a public officer.** Declining to allow a Commissioner unauthorized access to a subordinate employee, or to a family member's confidential contract information, is a refusal to participate in conduct inconsistent with the Charter and Florida law. **I have real and reasonable concern that continued enforcement of the Charter's non-interference clause against these two Commissioners has been met with escalating public criticism, a formal complaint, and now stated intentions by at least one Commissioner to force a change in my employment status** — the pattern of which I am documenting here for the record.

- **2.6 Prior Bias and the PAC (Political Action Committee) Petition**

- Before he was elected, Commissioner Duval stated publicly that he had a problem with me as City Manager, prior to ever meeting me. Separately, and more significantly for this evaluation period, **Commissioner Duval was present — and by video record, visibly supporting — a petition drive led by a former Commissioner and PAC (political action committee) leader whose stated purpose was my (an apolitical employee) removal from office.** This particular event for the petition effort took place last Fall, more than a year after Commissioner Duval had already been elected and sworn into office. **On December 6th; he participated in one of these petition events to gain signatures outside of the Post Office across from City Hall. Police were called to the scene to help remove the former commissioner because her political activity was not welcomed at this location by the staff at the Post Office and she refused to leave. Commissioner Duval was there supporting her at the time our law enforcement team forced the former commissioner to relocate from the Post Office's property.**
- The timing matters. This was not campaign-trail rhetoric from a private citizen seeking office; **it was a sitting, oath-bound City Commissioner actively supporting a public political campaign to remove the same City Manager he was, at that very time, legally and ethically obligated to work with in good faith under the Charter.** In my opinion, this conduct is inconsistent with the oath each commissioner takes to uphold the Charter— **a Commissioner using his standing to lend public support to an effort aimed at circumventing the lawful process for evaluating and removing a City Manager, rather than raising his concerns of removing the city manager through the Commission itself, including the annual evaluation process which the body the Charter designates for that purpose.** I raise this not to relitigate

the past, but because a **Commissioner who was actively working to remove me from office during this same evaluation period, through a channel outside the Charter's own process, brings a documented conflict into this review, and it is a fact the Commission should weigh when considering the weight and credibility of this year's criticism.**

- **Hostile Work Environment and Notice of Potential Retaliation**

Taken as a whole, the conduct documented in this section — a repeated, public refusal by two sitting Commissioners to be bound by the Charter after being shown independent legal opinions confirming what it requires; **a Commissioner pressing me and, ultimately, a department director for information on a family member's contract for his personal benefit; a Commissioner actively supporting a public campaign for my removal while sitting in office under oath; and public allegations raised only after, not before, my last formal evaluation was filed** —this conduct substantially interfered with my ability to perform my Charter responsibilities, sustained primarily by Commissioners Duval and Petrow over this evaluation period.

- I want this stated clearly and for the record. **It is my good-faith position that any future vote by either of these two Commissioners to terminate my employment, particularly following the pattern documented above, would raise concerns that these actions were retaliatory for my refusal to violate the Charter and for conduct I believe is consistent with the protections afforded by Florida.**

Self-Assessment

Despite all the above, I have met every stated criterion for City Commission Relations this year, and I have done so while defending the Charter's separation of policy and administration against sustained, public, and repeated pressure to abandon it — including at least one direct encounter that I believe warrants ethics review, and a pattern of conduct I believe was, in part, retaliatory. I do not believe the difficulty of this environment should inflate my score beyond what the work itself earned, but I also do not believe it should be used to discount it. I ask the Commission to evaluate this category on both the record of what was accomplished and the record of what it took to accomplish it, and I have documented both above for that purpose.

☐ 5-Exceptional ☒ 4-Highly Effective ☐ 3-Proficient ☐ 2-Inconsistent ☐ 1-Unsatisfactory
☐ N/A-Not Applicable

9. Financial Management / Budget
• Ensures the budget is prepared and executed in a productive manner • Addresses the budget concerns raised by the Commission as a whole • Administers the adopted and amended budget within the approved revenues and expenditures

- During this evaluation period, **I directed the FY27 budget process in response to the Commission's direction to begin with a 5% reduction target**, requiring departments to examine expenditures, efficiencies, staffing and service levels rather than simply carrying forward prior-year spending. **The resulting City Manager's Recommended Budget included nearly \$2.1 million in reductions, returned \$2.7 million to fund balance and proposed maintaining the City's existing millage rate for a seventh consecutive year** while continuing to protect essential services, infrastructure and public safety. The Recommended Budget was presented to the Commission with all funds financially balanced.
- **We strengthened the City's long-term financial-management framework by developing a Multi-Year Capital Plan Guide and standardized scoring methodology for more than 210 capital projects**, improving our ability to prioritize projects against available resources and strategic objectives. We also advanced stronger fiscal controls through enhanced p-card procedures, implementation of GASB 101, modernization of procurement and accounts-payable workflows, an ERP assessment, grant-compliance improvements and a comprehensive fee study to better align charges with the cost of providing services.
- I also maintained appropriate budgetary controls when financial conditions or project requirements changed. **Material adjustments were brought back to the Commission through the formal amendment process, including the \$4.082 million FY26 amendment required to fully fund the Warm Mineral Springs rehabilitation project.** Likewise, when the Commission directed the administration to evaluate capital borrowing, we used a competitive process that generated eight financing proposals and identified the option determined to provide the best overall value, while preserving the ability to reconsider the transaction before debt is actually incurred.
- These efforts have also been recognized externally. **In April 2026, the Finance Department received the Government Finance Officers Association's Distinguished Budget Presentation Award for the nineteenth consecutive year, along with special recognition for the City's Capital Program.** The City's 2026 awards record also confirms receipt of GFOA's Certificate of Achievement for Excellence in Financial Reporting. **The accomplishments workbook reports that the financial-reporting award represented the City's twenty-ninth consecutive recognition for the FY2024 ACFR and that the FY2025 ACFR received an unmodified audit opinion and was submitted for award consideration.**
- **Overall, my financial-management approach has been to provide the Commission with accurate information and realistic options, require departments to justify expenditures and seek efficiencies**, protect the City's long-term financial position, maintain appropriate controls over adopted appropriations, leverage outside funding whenever possible and ensure that taxpayer resources remain aligned with Commission priorities and measurable community needs.

- **Used competition to improve financing decisions: evaluated eight financing proposals for a potential capital loan of up to \$34.125 million, with repayment and fiscal-flexibility considerations expressly disclosed to the Commission and no debt incurred unless the transaction proceeds through validation and closing.**

☒ 5-Exceptional ☐ 4-Highly Effective ☐ 3-Proficient ☐ 2-Inconsistent ☐ 1-Unsatisfactory
☐ N/A-Not Applicable

OVERALL RATING

Score

☐ 5-Exceptional ☒ 4-Highly Effective ☐ 3-Proficient ☐ 2-Inconsistent ☐ 1-Unsatisfactory
☐ N/A-Not Applicable

(EMPLOYEES COMMENT)

Thank you for the opportunity to lead such a talented and dedicated team in serving our community. Despite the distractions created by two commissioners this year — who too often chose to seek direct access to staff rather than work through the policy and vision-setting role the Charter entrusts to the Commission — my team never lost focus. We delivered meaningful projects and outcomes that will benefit residents for years to come, and I could not be prouder of what we accomplished together under pressure. I am deeply grateful for this job. I love the work, I love this team, and I love serving this community. It remains a privilege to work on behalf of the Commission and the residents of North Port, and I look forward to building on this year's progress together.

CITY MANAGER SIGNATURE / DATE:

(INSERT SIGNATURE)	(INSERT DATE)
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