



Florida Association of City Clerks Fall Academy 2026 – Palmetto



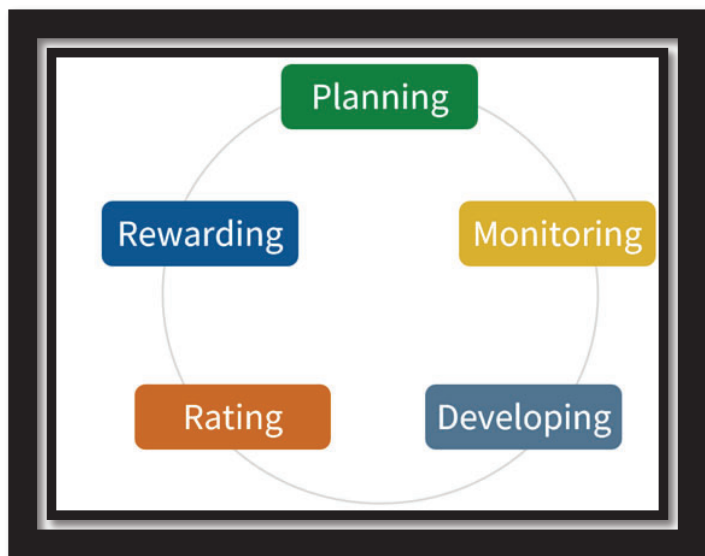
Performance Matters: Turning Expectations into Results

with Anne Schroeder – Fort Myers

Managing performance is about more than completing an annual evaluation—it's about helping team members succeed every day. In this fast-paced, interactive session, participants will learn how to set clear expectations, provide timely and constructive feedback, recognize strong performance, and address problems before they escalate. Discover practical techniques for coaching employees, documenting performance effectively, and conducting conversations that build accountability. Walk away with tools you can use immediately to improve individual performance and strengthen your team.

What We Will Cover:

- A. Define performance management and dimensions surrounding it.
- B. Behavior-based expectations with specific criteria.
- C. Build ownership and accountability of the work.
- D. Five roles of coaching.
- E. Feedback sessions and appraisals with specific behaviors.
- F. The STAR method for providing feedback.



Special Note: This course is not legal advice.

Quote for the Day:

“Without data, you're just another person with an opinion.”

– W. Edwards Deming

Think of a time when you did your best work. What made it possible?

Definition of performance management:

Performance management is a system by which a set of objectives and activities meet your municipality's goals in an effective and efficient manner.

List 2 – 3 **goals** that are set by the council and/or the City Manager or Mayor:

Write down any challenges/barriers standing in the way of achieving these goals.

Remember the Competencies: (from page 2 in the first course this morning)

- Key Legal & Compliance Competencies
- Administrative & Technical Competencies
- Professional Soft Skills & Interpersonal Competencies
- Professional Certifications in Florida



Now to Map Out the Differences

- **Competencies:** What capabilities does the team member need?
Knowledge, skills, abilities for effective performance that are broader
- **Behaviors:** What do those capabilities look like in action?
Observable and measurable actions that demonstrate a competency
- **Tasks:** What work does the team member actually perform?
Specific duties and job-related activities the team member performs

More Definitions

Competencies	Behaviors	Tasks
Communication, accountability, problem solving, customer service	Listens before responding, explains information clearly, follows through on commitments	Responds to citizen inquiries, prepares reports, processes paperwork for elections

Expectations

Task/Job Duty	Expectation/Performance Standard
1. Answer telephone	1. Answer phone by 3 rd ring using these protocols: • Greeting: “Good morning (or afternoon).” • Identify office: City Manager’s Office • Identify yourself: “Susan Scott speaking.” • Offer help: “How may I help you?”



Building Ownership and Accountability

Ownership and accountability are the result of your office's management practices.

Ownership: Taking responsibility for moving a request or task forward.

Accountability: Being able to explain what was done, what happened, and any necessary follow up.

From your perspective what specific practices can you carry out that promote ownership and accountability?

Feedback: The breakfast of champions!
Information about performance or behavior
that is used to determine improvement or next steps.



Five Coaching Roles

1. Educating: _____
2. Coaching: _____
3. Mentoring: _____
4. Counseling: _____
5. Confronting: _____



S.M.A.R.T. Goal Development

Goal: _____

Specific: What behavior do you want someone to do or stop doing? _____

Measurable: What is your metric? How will you know the goal has been reached?

Attainable: How do you know this goal **can** be reached? Has anyone reached it before? Do team members have the information and resources needed to reach this goal? _____

Relevant: Does this goal support your office's mission? Why is the attainment of this goal important? _____

Time Bound: What's the deadline for goal attainment? When will we collect the relevant data? _____

Revised SMART Goal: _____



Consider the S.T.A.R. Method



- Situation: _____
- Task: _____
- Actions: _____
- Result(s) _____

Feedback/Mentoring/Appraisal Preparation

1. Describe the performance and/or opportunity you will be discussing with your team member. Include details of specific actions.
2. What data sources will you be using? (direct observation, third party report(s), work products, self-reports)
3. Describe the team member you will be coaching/mentoring (attitude, background, experience, etc.)
4. How will the team member likely receive the information?
5. Describe where and when you plan to meet with this team member.
6. How will you go about putting the team member at ease?

And finally ... Jot down one or two ideas, or reminders, you gained today that are takeaways.
