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Appointee Evaluation Policy Comparison

Livermore Area Recreation and Park District

9/14/2026

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Overview

RPMG reviewed performance evaluation policies for three public agencies. All three place performance oversight with the governing board or council and hold confidential discussions of appointee performance. The key differences lie in review frequency and structure, the role of self-assessments and facilitators, whether compensation is addressed, and how much procedural detail each policy specifies.



City of
**Mountain
View**



**MARIN
WATER**

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Who Is Evaluated & Review Frequency

City of Mountain View

Who:

City Manager, City Attorney, City Auditor (if active), City Clerk

Frequency:

Detailed annual cycle (May–September) with language to reshape milestones as needed.

AC Transit

Who:

General Manager, General Counsel, District Secretary

Frequency:

Formal evaluation every two years (odd years); informal check-ups in even years. May be more frequent as circumstances require.

Marin Water

Who:

General Manager and General Counsel

Frequency:

Annual cycle (January–April). May be deferred if appointee is hired less than 6 months before the cycle starts.

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Board/Council Role

City of Mountain View (Led by Vice Mayor)

- Sets areas of emphasis for self evaluation with facilitator
- Reviews self evaluation
- Discusses performance themes & reaches consensus in closed session
- Approves compensation adjustments
- Reviews and approves evaluations

AC Transit (Board or Special Committee)

- Sets areas of emphasis for self evaluation
- Reviews self evaluation
- Develops a narrative evaluation
- Meets in closed session to reach consensus & set next-cycle priorities
- Finalizes the evaluation, including compensation adjustment
- Participation caveat for Board members serving for less than 6 months

Marin Water (Led by Board President)

- Meets with facilitator to review process
- Reviews self evaluation
- Reviews facilitator-generated preliminary evaluation report
- Meets in closed session to review facilitator-generated report
- Finalizes the evaluation, including compensation adjustment

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Appointee Input and Facilitator Role

City of Mountain View

Appointee Input:

- Required Self Assessment with at least 45 days to prepare.

Facilitator:

Required

AC Transit

Appointee Input:

- Required Self Assessment with 15-30 days to prepare
- Optional opportunity to submit a response to their evaluation within 15 days of meeting with the committee. This will be attached to their evaluation.

Facilitator:

Optional

Marin Water

Appointee Input:

Required Self Assessment. Timeline not specified.

Facilitator:

Required

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Evaluation Content

City of Mountain View

Self Evaluation:

- Assessment of personal growth
- Evaluation on how they addressed past feedback
- Growth areas for the coming year
- Challenges
- Contributions to Council work plan
- Compensation request

Performance Evaluation:

- Facilitator led

AC Transit

Self Evaluation:

- Contributions to the goals and objectives of the District's Strategic Plan/previous evaluation

Performance Evaluation:

- Adherence to position responsibilities
- Next-cycle priorities
- Optional rating tool may be applied

Marin Water

Self Evaluation:

- Prior-year goals and achievements
- Proposed goals for the coming year

Performance Evaluation:

- Facilitator Led

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Compensation

City of Mountain View

Integrated into the annual process

- Appointees add requests to self evaluation
- Council decides adjustments, informed by HR compensation surveys, with subsequent open-session action

AC Transit

Integrated into the policy

- Appointees can submit compensation requests
- The Board can decide adjustments, informed by compensation studies and contract negotiations, in a process with specific steps

Marin Water

Integrated into the annual process

- Appointees must receive a "satisfactory" evaluation for compensation adjustment consideration

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Documentation and Follow-Up

City of Mountain View

- Finalized drafts are distributed to the Council and the Appointees
- Individual September meetings led by the Vice Mayor and the facilitator convey the final evaluation and compensation adjustments to the Appointees

AC Transit

- Finalized drafts are distributed to the Board and the Appointees
- **Past practice:** Board President, Vice President and facilitator meet with the Appointee to deliver results including compensation
- Final evaluation signed by the Board President and Appointee is kept in the personnel file in the District Secretary's Office.

Marin Water

- Finalized drafts are distributed to the Board and the Appointees
- **Past practice:** Facilitator and Board meet with Appointees to deliver results, including compensation
- The evaluations are maintained as confidential personnel information

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Key Similarities

- **Board/Council Responsibility**
 - Each organization assigns the Board/Council oversight into the evaluation process
- **Confidentiality**
 - Each organization specifies closed sessions and/or the confidential nature of personnel documents
- **Evaluation Framework**
 - Each organization uses Appointee responsibilities, organizational expectations, present or upcoming goals, or prior feedback to structure the process
- **Upcoming Priorities**
 - Each organization includes some element of evaluating upcoming priorities for the Appointee
- **Compensation**
 - Each organization connects the evaluation process to compensation

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Key Differences

- **Structure**
 - Each organization applies a varied level of structure and timeline, with Mountain View having the clearest expectations of roles, responsibilities, and process deadlines
- **Flexibility**
 - Each organization specifies some flexibility, with AC Transit clarifying their policy "not intended to be prescriptive or limit the Board's discretion to abbreviate or expand the process when deemed appropriate"
- **Rigidity in Compensation Expectations**
 - While compensation is tied to each evaluation process, the strictest language from Marin Water requires "satisfactory" evaluations for compensation adjustments to be considered
- **Frequency**
 - Some organizations specify annual evaluations while others only conduct this process formally bi-annual, with informal check-ins in between

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Questions?

Board/Council Appointee Performance Evaluation Policy Comparison

RPMG reviewed performance evaluation processes from the City of Mountain View, AC Transit, and the Marin Municipal Water District. All three policies place performance oversight with the governing board/council and feature confidential discussions of appointee performance. The principal differences are the frequency and structure of the review, the role of self-assessments and facilitators, the inclusion of compensation, and the level of procedural detail.

	City of Mountain View	AC Transit	Marin Municipal Water District
Who is evaluated	City Attorney, City Auditor (if the position is active), City Clerk, City Manager.	General Manager/CEO, General Counsel, District Secretary.	General Manager and General Counsel.
Frequency	Detailed annual cycle starting in May and ending in September, with language to reshape process milestones if needed.	Formal performance/compensation evaluation every two years (odd years); informal check-ups in even years. May be more frequent in some circumstances.	Annual evaluation cycle for the General Manager and General Counsel begins January 31 with efforts to complete evaluations by April 31. The process may be deferred if the appointee is hired less than 6 months before the evaluation cycle starts.
Board/council role	Council sets areas of emphasis, reviews memoranda, discusses performance themes, reaches consensus, approves compensation adjustments, and reviews draft evaluations.	Board or special committee develops guidance, reviews self-assessment, develops narrative evaluation, meets in closed session, reaches consensus, sets next-cycle priorities, and finalizes the evaluation.	Board conducts the review with facilitator and meets in closed session, determines whether the review is satisfactory for the July 1 COLA, and agrees on upcoming goals.
Appointee input	Detailed year-in-review memorandum/self-assessment; at least 45 days to prepare.	Written self-assessment; 15–30 days to submit.	Written self-assessment. Timeline not clarified beyond the evaluation process.
Inclusion of facilitator	Required; facilitator is central to the process and prepares draft evaluation language.	Optional; Board may use a professional facilitator to support the written narrative/final document	Required; the consultant conducts the evaluations and prepares the final documents.
Evaluation content as clarified in the policies	Personal growth, prior feedback, growth focus areas, impediments, adherence Council workplan	Position responsibilities, operational objectives, District Strategic Plan/previous evaluation, performance narrative, overall rating tool (optional), and next-cycle priorities.	Prior-year goals and achievements; proposed goals for coming year.
Compensation	Integrated into annual process; Council decides adjustments, with HR compensation surveys and subsequent open-session action	Integrated into policy; Board may consider adjustments, compensation studies, and negotiations, with specified next steps	Integrated into annual process; A minimum satisfactory evaluation is required before the July 1 cost-of-living increase under the employment agreements

Documentation / follow-up	Facilitator drafts consensus evaluations; individual meetings in September convey final report and results to appointees; compensation communicated/implemented afterward. Reports are confidential personnel information.	Final documentation is distributed to the appointee and the full Board. Final signed evaluation and any employee response to go into confidential personnel file; officer may submit written response within 15 days of receiving results to also go into file.	Consultant prepares preliminary and final reports which include agreed upon goals. Reports are distributed to the appointees and HR director. Reports are confidential personnel information.
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Key similarities:

- Board/council responsibility: each source assigns the governing body a direct oversight role in evaluating its appointees.
- Confidentiality: each source utilized closed sessions due to the nature of the discussions being performance-based.
- Expectations and improvement: each framework uses responsibilities, expectations, goals, prior feedback, or similar criteria to inform the review.
- Forward-looking component: each framework includes, to varying degrees, expectations or priorities for the next cycle.
- Compensation connection: Mountain View, MMWD and AC Transit expressly connect evaluation to compensation.

Key differences:

- Most structured: Mountain View establishes a defined April/May–September annual cycle, required facilitator, Council-member input, 45-day memorandum period, draft/final evaluation steps, compensation surveys, and follow-up.
- Most flexible: AC Transit describes its evaluation process as a general guideline that the Board may abbreviate or expand; it also alternates formal evaluations with informal check-ups.
- Most rigid on Compensation: While Mountain View and AC Transit expressly integrate compensation into the evaluation framework, MMWD's makes a satisfactory annual review a condition for the July 1 COLA under the employment agreements.
- Frequency: Mountain View and MMWD use annual reviews; AC Transit uses a formal evaluation every other year with interim check-ups.