

Alberto M. Carvalho, Associate Superintendent
Office of Intergovernmental Affairs, Grants, Marketing, and Community Services

SUBJECT: PERFORMANCE EVALUATION TOOL FOR CONTRACTED LOBBYISTS

COMMITTEE: INNOVATION, EFFICIENCY & GOVERNMENTAL RELATIONS

LINK TO DISTRICT STRATEGIC PLAN: EVALUATE AND REDESIGN INTERNAL BUSINESS OPERATIONS

Pursuant to Board action on September 5, 2007, Board Item H-4, proffered by Ms. Perla Tabares Hantman, School Board Member, a proposed evaluation tool for board-paid contracted lobbyists has been developed. The proposed evaluation tool is modeled after Miami-Dade County's Contract Lobbyist Performance Evaluation.

Each contracted lobbyist will, as in the past, be assigned specific items in the Board's proposed 2008 state and federal legislative platforms to navigate through the legislative process. Each contracted lobbyist will be evaluated based on the following criteria on each of the respective issues assigned:

- ✓ File bill, amendment or Community Budget Issue Request (CBIR): This quantifies the contracted lobbyist's efforts in having the assigned issues approved by The School Board of Miami-Dade County, Florida, introduced in the legislative process which may include the filing of legislation, filing of amendments, seeking sponsors for bills and or amendments throughout the legislative process.
- ✓ Contact with legislative leadership: This quantifies the lobbyist's efforts in advancing the School Board's issues with legislative leaders, including presiding officers and their respective staff in each of the chambers.
- ✓ Contact with committee chair and members assigned: This quantifies the lobbyist's efforts in advancing the School Board's issues through the committee process by maintaining close contact with committee chairs and committee members of committees assigned to monitor.
- ✓ Attendance of committee meetings: This quantifies the contracted lobbyist's efforts in advancing the School Board's issues through attendance and close monitoring of committee assignments.

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- ✓ Communication with Intergovernmental Affairs and Grants Administration (IAGA): This quantifies the contracted lobbyist's efforts in advancing the School Board's issues through timely communication with the Associate Superintendent for the Office of Intergovernmental Affairs, Grants, Marketing, and Community Services and his or her representatives, providing minimally weekly written updates, as well as attending weekly lobbyist meetings throughout the legislative process.
- ✓ Proactive teamwork and creativity: This represents the contracted lobbyist's efforts in seeking opportunities to advance the School Board's issues by working collaboratively with other members of the team; and developing creative opportunities to advance School Board-approved issues.
- ✓ Final outcome of the School Board's legislative issues: This quantifies the outcome of the legislative issue assigned by the contracted lobbyist. This criterion does not simply reflect the favorable or unfavorable outcome on specific issues but includes modification/amendments to an issue that would make the implementation more favorable for the District.
- ✓ Relationship development with legislators, legislative staff and statewide associations: This quantifies the contracted lobbyist's efforts in fostering relationships with legislators, staff and other stakeholders in the process.
- ✓ Knowledge of educational issues including educational funding: This quantifies the contracted lobbyist's knowledge of education policy and funding.
- ✓ Professional responsibility: This quantifies the manner in which the contracted lobbyist carries out his/her duties.

In developing the above benchmarks for performance and effectiveness of the contracted lobbyists, it is important to note that each issue included in the Board's legislative platform requires different levels of effort to achieve a favorable outcome. In fact, some issues may not pass in the exact format that the School Board originally proposed, but may require a certain level of compromise to pass in any form. It is also important to point out that in some cases, despite all reasonable efforts on the part of staff and the contracted lobbyists, an issue will not be successful through the legislative process due to opposing forces outside of their control and should be considered during the evaluation of the performance of the contracted lobbyist. Nevertheless, the criteria proposed above represents actions generally associated with effective lobbying performance.

Performance will be identified as: "O" for Outstanding; "A" for Acceptable; "U" for Unacceptable; and "N/A" for Not Applicable. The contracted lobbyist will be evaluated based on each of the criteria above for each issue assigned from the Board's platform. An overall score will then be applied to each contracted lobbyist. The criteria and scoring are an attempt to objectively review contracted lobbyist performance which admittedly involves some subjectivity. The aggregate score will be transmitted to the Board annually and will be used to determine whether their services will be continued.

RECOMMENDED: That The School Board of Miami-Dade County, Florida, accept the performance evaluation tool for contracted lobbyists

AMC/IRM-C

CONTRACTED LOBBYIST PERFORMANCE EVALUATION TOOL

CONTRACT LOBBYIST NAME:	Contract Period:
Issues:	
<input type="checkbox"/> File Bill <input type="checkbox"/> Amendment <input type="checkbox"/> Community Budget Issue Request (CBIR):	<input type="checkbox"/> Outstanding <input type="checkbox"/> Unacceptable <input type="checkbox"/> Acceptable <input type="checkbox"/> Not Applicable
Contact with Legislative Leadership:	<input type="checkbox"/> Outstanding <input type="checkbox"/> Unacceptable <input type="checkbox"/> Acceptable <input type="checkbox"/> Not Applicable
Contact with Committee Chair and Members Assigned:	<input type="checkbox"/> Outstanding <input type="checkbox"/> Unacceptable <input type="checkbox"/> Acceptable <input type="checkbox"/> Not Applicable
Attendance of Committee Meetings:	<input type="checkbox"/> Outstanding <input type="checkbox"/> Unacceptable <input type="checkbox"/> Acceptable <input type="checkbox"/> Not Applicable
Relationship development with legislators, legislative staff and statewide associations:	<input type="checkbox"/> Outstanding <input type="checkbox"/> Unacceptable <input type="checkbox"/> Acceptable <input type="checkbox"/> Not Applicable
Knowledge of educational issues including educational funding:	<input type="checkbox"/> Outstanding <input type="checkbox"/> Unacceptable <input type="checkbox"/> Acceptable <input type="checkbox"/> Not Applicable
Communication with Intergovernmental Affairs & Grants Administration:	<input type="checkbox"/> Outstanding <input type="checkbox"/> Unacceptable <input type="checkbox"/> Acceptable <input type="checkbox"/> Not Applicable
Proactive team work and creativity:	<input type="checkbox"/> Outstanding <input type="checkbox"/> Unacceptable <input type="checkbox"/> Acceptable <input type="checkbox"/> Not Applicable
Professional responsibility:	<input type="checkbox"/> Outstanding <input type="checkbox"/> Unacceptable <input type="checkbox"/> Acceptable <input type="checkbox"/> Not Applicable
Final Outcome:	<input type="checkbox"/> Outstanding <input type="checkbox"/> Unacceptable <input type="checkbox"/> Acceptable <input type="checkbox"/> Not Applicable
Overall Evaluation:	<input type="checkbox"/> Outstanding <input type="checkbox"/> Unacceptable <input type="checkbox"/> Acceptable <input type="checkbox"/> Not Applicable

Reviewer's Signature: _____

Date: _____