

KAY BLACKBURN, INTERNAL AUDITOR
Performance Evaluation

David Suchart
W. 5. b.

OVERALL PERFORMANCE RATING

INSTRUCTIONS: Prior to completing the overall performance rating section, the employee should be rated on the individual performance factors that are significant to his/her position. To determine the overall performance rating, consider both the employee's performance level in each factor and the importance of the factor in the employee's position.

Overall work performance meets job expectations and job standards. This performance contributes to the achievement of departmental/unit goals and objectives.

☐
SUCCESSFUL

Overall work performance is consistently above expectations and job standards. This performance enhances the achievement of departmental/unit goals and objectives.

☒
EXCEEDS EXPECTATIONS

Overall work performance clearly exceeds expectations and job standards by an exceptional degree. This high level of performance is continually maintained.

☐
EXCEPTIONAL

RATER'S COMMENTS:

EVALUATION FORM RATINGS

S = Successful EE = Exceed Expectations E = Exceptional
(Choose one rating for each category.)

- | | | |
|----|-----|--|
| EE | 1. | KNOWLEDGE: consider knowledge of required duties; knowledge of equipment used, policies and procedures. |
| EE | 2. | QUALITY: consider acceptability and quality; nature and quantity of errors; thoroughness of work. |
| E | 3. | ADAPTABILITY: consider the ability to adapt to new tasks and procedures or stressful situations. |
| E | 4. | COOPERATION: consider working relationships; participation in teamwork situations. |
| EE | 5. | QUANTITY: consider ability to provide performance required to maintain department standards under normal conditions. |
| EE | 6. | DEPENDABILITY: consider amount of supervision required to get the job done and meet deadlines. |
| EE | 7. | INITIATIVE: consider degree to which employee is a self-starter; ability of employee to effectively use available work time. |
| EE | 8. | COMMUNICATIONS: consider degree to which employee effectively expresses her/himself orally and/or in writing and the degree to which employee effectively listens and understands others. |
| EE | 9. | WORK HABITS: consider observance of work hours and rules. |
| — | 10. | WORKPLACE SAFETY: consider degree to which employee's work exhibits safe working procedures; compliance with safety guidelines. |

- A. List two specific examples that demonstrate the most outstanding contributions and/or achievements of this person with regard to his/her job performance.
1. Assistance with benefits policy and administration
 2. Assistance with annual audit management letter
- B. Describe in order of importance two specific examples of things this person could improve upon in order to increase his/her job performance.
- 1.
 - 2.

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Anna Morrison

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- 10. **WORKPLACE SAFETY:** consider degree to which employee's work exhibits safe working procedures; compliance with safety guidelines. **DO NOT OBSERVE THIS**

A. - List two specific examples that demonstrate the most outstanding contributions and/or achievements of this person with regard to his/her job performance.

1. Keeping F&A members aware of concerns and willingness to discuss options
2. Does not show bias

B. Describe in order of importance two specific examples of things this person could improve upon in order to increase his/her job performance.

1. Be more aggressive with BCC & make sure all of us understand ramifications.
- 2.

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Peter Sorenson

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- A. List two specific examples that demonstrate the most outstanding contributions and/or achievements of this person with regard to his/her job performance.

1. Briefing Board Members on Audit Activities

2.

- B. Describe in order of importance two specific examples of things this person could improve upon in order to increase his/her job performance.

1. copy Board on items sent to F & A

2.

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Kenneth Artias

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RATER'S COMMENTS: I have thoroughly enjoyed working with Kay the past two years. I find her to be personable, hard-working, very intelligent and thoughtful. She has been willing to take on responsibilities as appropriate, and completes her tasks well and timely. She is an active participant in any meeting she attends, and contributes good insight and ideas from her time in the private sector. I believe she has successfully made the transition from private sector to public sector by understanding the political considerations that she must work with here at Lane County. Not all people are able to understand the difference and adapt accordingly.

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A. List two specific examples that demonstrate the most outstanding contributions and/or achievements of this person with regard to his/her job performance.

1. I worked with Kay on the HIPAA Task Force that was charged with the responsibility of understanding the legislation and determining how the various departments in Lane County would need to change their operations to comply with these rules. Kay did a lot of research in this area and brought information to the Task Force as to how other jurisdictions were dealing with this issue. Kay was always prepared for meetings and participated actively as we worked through the various problems. Her knowledge and experience from her time working in the private sector enabled her to contribute ideas and insight that were valuable to the Task Force. She also took on the duties of Lane County's Privacy Officer.

2. Kay and I were members of Process Improvement committee that was part of the Performance Counts program. We worked together in developing and evaluating ways that departments could focus on improving work processes in order to be more effective and/or to control costs. Kay was willing to take on any responsibilities that were needed. She worked effectively and enthusiastically with departments as we set up, and participated in, some process improvement projects.

B. Describe in order of importance two specific examples of things this person could improve upon in order to increase his/her job performance.

1. From my work with Kay, I cannot think of any specific areas of improvement to suggest.

2.