



LANE COUNTY

HUMAN RESOURCES DEPARTMENT / 125 East 8th Ave. / Eugene, OR 97401
Phone: (541) 682-3665/ Fax: (541) 682-4290

W. L. D.

AGENDA COVER MEMO

Memorandum Date: July 25, 2008

TO: Board of County Commissioners
DEPARTMENT: Board of County Commissioners
PRESENTED BY: Faye Stewart, Board Chair
AGENDA ITEM TITLE: Discussion/Evaluation of County Administrator

I. AGENDA ITEM SUMMARY

This is the discussion of the County Administrator's six month performance evaluation.

II. BACKGROUND/IMPLICATIONS OF ACTION

A. Board Action and Other History

County Administrator Jeff Spartz was selected and hired to be Lane County Administrator late last year. He began his position on December 31, 2008.

In the Board Order hiring him, the Commissioners indicated that they would perform an evaluation of his performance after Mr. Spartz's had served for six months.

The members of the BCC were sent a list of questions around which to focus their discussion as were Jeff's employees in County Administration, other elected officials, and appointed department directors. This memo summarizes the comments received from all but the Commissioners.

B. Policy Issues

The County Administrator serves at the pleasure of the Board of County Commissioners and since the County's personnel system is based on merit and fitness, providing Mr. Spartz with timely performance input is imperative.

C. Board Goals

Section A2 of the County's Strategic Plan states that

"All officials, managers, and employees will be expected to cultivate the knowledge and skills necessary to perform their responsibilities well. Personnel policies will encourage job-related training and career development support. As a consequence, each employee will be responsible for contributing to the overall success of the County by performing his or her job to the best of his or her ability."

By conducting a six-month performance evaluation for the new County Administrator, the Board is setting a good example for the County's employees and following the goals set forth in the Strategic Plan.

D. Financial and/or Resource Considerations

This is an informational item only.

E. Analysis

A set of general questions was distributed to those asked to participate in the County Administrator review process. The questions and the summary of responses received (in italics) follow.

1. Job knowledge: Has he gained familiarity with the County's procedures, regulations and issues as they relate to his role as County Administrator? Is he able to perform his duties effectively? Is there any other knowledge or experience he's used or should have used to help you or work with you?

From the eight responders summarized in this report, the answers were very consistent. Everyone felt that Jeff came to Lane County with excellent job knowledge because of past experience, and the rate at which he has learned about Lane County and Oregon government is admirable. Several referenced the very difficult budget he was immediately obligated to develop and the good job he did dealing with the media.

2. Job quality: Is his work thorough and timely? Has it provided you with the assistance you've needed to do your job or fulfill your function?

Responses to this question were either positive (answered with Yes and Yes) or the responders have not yet had the opportunity to work with Jeff in a way that was dependent upon Jeff's work product. However, his budget message and knowledge of the County's financial needs and his budget message were cited as being particularly helpful

and thorough.

3. Relationships: Do you find Jeff to be easily approachable, willing to listen and advise you on issues? Is he patient, tactful, cooperative, helpful? How so? How not?

All respondents indicated that their appreciation of Jeff's open door policy and his ability to listen and offer advice when asked. The only negative comments focused on Jeff's predilection to tell stories and make analogies to historical situations when staff is anxious for direction and needing to get back to work.

4. What would you encourage him to do more of? Less of?

Themes here were more communication/outreach with the community and staff; more creative option offering to the BCC; more leading and directing in combination with his excellent listening skills.

5. Do you have any other information you would like to offer which you feel would be of help to Jeff in his position?

Most did not respond to this, although there were two specific suggestions. One was for Jeff to have weekly meetings with staff who are scheduled to appear before the Board the following week in order to more thoroughly familiarize himself with the issues; the second was for him to remember that, despite the very difficult times we are going through at Lane County right now, "this too shall pass" and we can be cautiously optimistic about our future.

F. Alternatives/Options

The Board may incorporate the summarized feedback and specific comments from the attached documents into their review of Mr. Spartz, and include the objectives and goals they expect him to meet prior to his annual performance review, to be held in January 2009.

III. FOLLOW-UP

Based on the discussion of Mr. Spartz's six month evaluation, Human Resources will work with the board to develop the format for the one year evaluation.

IV. ATTACHMENTS

Attachment A: Comments from staff & other elected officials
Attachment B: Comments from Commissioners

MEMORANDUM

Date: July 16, 2008

RE: **Six Months Performance Review for Jeff Spartz**

Jeff's six month performance review date was the end of June, and the Board will be discussing it in **open session on July 30**. Jeff and the Board would like your feedback so they can consider it as part of their evaluation of him. This feedback will be used to create a composite summary report so that the Board can more easily get a sense of how his peers and employees view his performance. Your individual response will also be included in the agenda packet. If you would like to provide input, **your response must be sent to Zoe Gilstrap and me by the end of day Tuesday, July 22**.

I will not attribute names to specific comments in the report I'll be preparing for the Board, but your specific form will be forwarded to them and will become public record under Oregon Public Records law. If you wish to submit your feedback anonymously, please fill in this form in hard copy format and forward it to me and Zoe via interoffice courier, **again by the end of the day, Tuesday July 22**.

Thanks for your participation.

1. Job knowledge: Has he gained familiarity with the County's procedures, regulations and issues as they relate to his role as County Administrator? Is he able to perform his duties effectively? Is there any other knowledge or experience he's used or should have used to help you or work with you?

I was particularly impressed by Jeff's comments during the budget process, made to both the budget committee and to the media. He quickly gained an understanding for the process and knew how to quickly summarize his comments for the media, such that I felt he was a good spokesperson for Lane County during a very trying and challenging time.

2. Job quality: Is his work thorough and timely? Has it provided you with the assistance you've needed to do your job or fulfill your function?

This has yet to be determined as I have not had a great deal of exposure to his work per se. I see one element of my job as providing him with documents and other correspondence. He has let me do my job, which is great, and I'm assured he'll comment if I'm not on track.

3. Relationships: Do you find Jeff to be easily approachable, willing to listen and advise you on issues? Is he patient, tactful, cooperative, helpful? How so? How not?

Jeff is very approachable. He is helpful in that he has a wealth of experience to share, which is usually related to an issue at hand. But he also should notice when he's shared enough and should let staff get to work, rather than hear a non-related story or be subject to his comprehensive knowledge of US history.

4. What would you encourage him to do more of? Less of?

More: sharing communications. He's got to not only look at the content of what he's receiving, but also evaluate who on staff also needs the information. More: continue to encourage big thinking and outside the box thinking. This organization is starved for that kind of manager. The elected officials can exhibit a fair amount of skepticism when it comes to staff recommendations and Jeff needs to be able to prop them back up and inspire them to continue. More: advocacy for the County as a public speaker. Jeff is a superior communicator, comfortable with a great variety of audiences. I could see him putting the County in a different light to residents than previous administrators have done, or which results from media reports stemming from Board meetings. He has an opportunity to become more of a spokesperson for the organization, as it feels as if there is a fairly large void here in this regard. More: Building a management team that is better able to work synergistically. The individual elements are in place, but I haven't witnessed much team building and I believe Jeff must lead in this regard.

5. Do you have any other information you would like to offer which you feel would be of help to Jeff in his position?

One thing that he might consider is a weekly meeting with staff who are scheduled to come before the BCC that week. He more than most has a sense of where each Commissioner is coming from and being able to provide that information to staff may be helpful. It may also serve to inform Jeff more thoroughly about issues that are scheduled to be considered by the Board.

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1. Job knowledge: Has he gained familiarity with the County's procedures, regulations and issues as they relate to his role as County Administrator? Is he able to perform his duties effectively? Is there any other knowledge or experience he's used or should have used to help you or work with you?

From my perspective, Jeff has grasped the County's procedures, regulations and issues amazingly quickly, and there has been no "lack of knowledge" impediment to his performing his duties. He is also very open to asking or learning if there is something in place, and his knowledge of local government generally has enabled him to easily step into the role of County Administrator and to provide strong, effective and decisive work. He is one of the most well-informed, knowledgeable people I have ever met!

2. Job quality: Is his work thorough and timely? Has it provided you with the assistance you've needed to do your job or fulfill your function?

Jeff is "on top" of the situation, and has been some almost from the time he started. When a situation calls for an immediate decision, he makes it; when more information would be helpful, he seeks it. One aspect of his work that I appreciate is his recognition of the different roles that he and I have in the organization and the need to make sure that they are coordinated. And while he is committed to doing everything well within the scope of the law, he appreciates the need for the organization to not be unduly limited by it, but to engage in careful management that mitigates risks.

3. Relationships: Do you find Jeff to be easily approachable, willing to listen and advise you on issues? Is he patient, tactful, cooperative, helpful? How so? How not?

I find Jeff to be highly approachable—as well as patient, tactful, cooperative and helpful. He is a constructive listener, and is good a discerning when someone is asking for help or is brainstorming or is simply "venting" and his response is appropriate to the situation.

4. What would you encourage him to do more of? Less of?

I would encourage Jeff to be a bit more proactive, both with the Board and with the organization overall. He now has a pretty good feel for both, and I think that each would benefit if Jeff were to suggest approaches or solutions to situations that arise, and even more, if he were to recommend a course of action or a direction that he would like to see occur.

5. Do you have any other information you would like to offer which you feel would be of help to Jeff in his position?

Jeff is absolutely to be commended for his work on the budget this year. At a time when he was quite new to the organization, he was faced with a task of proposing massive reductions. He spent an impressive amount of time learning what the impacts would likely be, assessing and evaluating them, and then proposing restorations to achieve a better balance of services that protected the citizens as best as possible. It was a virtually impossible task, and certainly a thankless one, but he did it impressively well. Perhaps the best evidence of that is how quietly it was done, achieving a high degree of "unruffled feathers" or perhaps even "soothed feathers" when that certainly would not have been predicted at the start.

Jeff – I am grateful to have this opportunity to work with you – thank you for all you do!!!

Teresa Wilson

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Thanks for your participation.

1. Job knowledge: Has he gained familiarity with the County's procedures, regulations and issues as they relate to his role as County Administrator? Is he able to perform his duties effectively? Is there any other knowledge or experience he's used or should have used to help you or work with you?

Jeff came to the job of County Administrator with excellent job knowledge from his prior experiences. He did an excellent job understanding our budgeting process, relied on our excellent budget staff appropriately, and produced a balanced budget in an ugly cut situation.

2. Job quality: Is his work thorough and timely? Has it provided you with the assistance you've needed to do your job or fulfill your function?
From my viewpoint as District Attorney, he analyzed the public safety system correctly in the budget process and made good although painful reduction scenarios.

When we had several homicides in January of this year, Jeff called and asked whether or not we would need a supplemental appropriation in order to properly prosecute those cases. It is the first time in 24 years a county administrator had asked that question. It was nice to know he was concerned about the District Attorney's office.

3. Relationships: Do you find Jeff to be easily approachable, willing to listen and advise you on issues? Is he patient, tactful, cooperative, helpful? How so? How not?

Jeff and I have had several good conversations since he came to Lane County as the Administrator. He is very bright, very well read, and understands finance. He always has a quote or a story from some famous person that seems appropriate to the situation we're discussing. He is attentive when I'm talking and makes good eye contact. He has a deep-throated laugh which is unique and enjoyable.

He is certainly cooperative and helpful. He analyzed, correctly in my opinion, the importance of the prosecutor's office in the criminal justice system and restored significant dollars in the proposed budget. I have seen him be tactful with people, particularly board members, when he is trying to help them move to a solution.

4. What would you encourage him to do more of? Less of?

No suggestions here.

5. Do you have any other information you would like to offer which you feel would be of help to Jeff in his position?

No additional information.

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Thanks for your participation.

1. Job knowledge: Has he gained familiarity with the County's procedures, regulations and issues as they relate to his role as County Administrator? Is he able to perform his duties effectively? Is there any other knowledge or experience he's used or should have used to help you or work with you? **Yes. He's done a remarkable job of getting up to speed on a wide variety of subjects. Occasionally he sees parallels where none exist because he assumes similarity between our circumstance and that found in his prior jurisdiction, a natural inclination, but on balance he's extremely capable, astute and disciplined about doing the homework he needs to be properly informed.**
2. Job quality: Is his work thorough and timely? Has it provided you with the assistance you've needed to do your job or fulfill your function? **Yes, in every respect.**
3. Relationships: Do you find Jeff to be easily approachable, willing to listen and advise you on issues? Is he patient, tactful, cooperative, helpful? How so? How not? **Yes. He's great. It would be okay if he felt less obliged to describe every challenge with an opaque analogy or obscure 19th century quote, but he's a kind, intelligent, thoughtful, capable man. We're very fortunate to have him – especially given the salary he's paid and all he has to tolerate.**
4. What would you encourage him to do more of? Less of? **No.**
5. Do you have any other information you would like to offer which you feel would be of help to Jeff in his position? **This too shall pass. ☺ I want him to know that his management team realizes how impossible his job is. We feel for him, we have faith in him, we're grateful for him, and we're somewhat optimistic that the county leadership woes and terrible financial challenges will eventually be replaced by more favorable, workable and professionally rewarding conditions.**

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Yes, as far as I can tell he is now familiar with the County and is able to perform his duties.

2. Job quality: Is his work thorough and timely? Has it provided you with the assistance you've needed to do your job or fulfill your function?

Unknown.

3. Relationships: Do you find Jeff to be easily approachable, willing to listen and advise you on issues? Is he patient, tactful, cooperative, helpful? How so? How not?

I find Jeff very approachable and willing to listen and advise. I think this is one of his strengths.

4. What would you encourage him to do more of? Less of?

I would encourage him to take a more active role in the dialogue or conversation during Board meetings. I can never tell what he thinks.

5. Do you have any other information you would like to offer which you feel would be of help to Jeff in his position?

I like the fact that he is often in his office and has met with me several times, even when I did not have an appointment.

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I think he has performed his duties effectively. I found that he learned about the issues quickly.

2. Job quality: Is his work thorough and timely? Has it provided you with the assistance you've needed to do your job or fulfill your function?

I have found his work to be timely.

3. Relationships: Do you find Jeff to be easily approachable, willing to listen and advise you on issues? Is he patient, tactful, cooperative, helpful? How so? How not?

Jeff is extremely approachable. He is willing to listen to concerns I may have. His sense of humor is wonderful!

4. What would you encourage him to do more of? Less of?

None.

5. Do you have any other information you would like to offer which you feel would be of help to Jeff in his position?

None.

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Thanks for your participation.

1. Job knowledge: Has he gained familiarity with the County's procedures, regulations and issues as they relate to his role as County Administrator? Is he able to perform his duties effectively? Is there any other knowledge or experience he's used or should have used to help you or work with you?

Jeff has quickly learned about Lane County and the services it provides and its procedures, regulations and issues. He is able to communicate with department directors, staff, elected officials, other jurisdictions and agencies in a very professional and knowledgeable manner. He has earned credibility with the organization and the community in a short period of time. Jeff is a very competent administrator.

2. Job quality: Is his work thorough and timely? Has it provided you with the assistance you've needed to do your job or fulfill your function?

Yes, it is important to Jeff to be well informed so that he is always prepared and knowledgeable. He has always provided clear and accurate information and direction to me.

3. Relationships: Do you find Jeff to be easily approachable, willing to listen and advise you on issues? Is he patient, tactful, cooperative, helpful? How so? How not?

Jeff has an open-door policy, and is always accessible to those that have a need to talk to him "on the spur of the moment" or set an appointment when necessary. He is very responsive to the needs of others and is very respectful of staff. Jeff allows staff to do their job and provides input when needed or asked for.

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1. Job knowledge: Has he gained familiarity with the County's procedures, regulations and issues as they relate to his role as County Administrator? Is he able to perform his duties effectively? Is there any other knowledge or experience he's used or should have used to help you or work with you?

Jeff is a knowledgeable, competent administrator. I appreciate his thoughtful approach to his work and the sense of humor he brings to the challenging business of running County government.

2. Job quality: Is his work thorough and timely? Has it provided you with the assistance you've needed to do your job or fulfill your function? *Yes on both accounts.*

3. Relationships: Do you find Jeff to be easily approachable, willing to listen and advise you on issues? Is he patient, tactful, cooperative, helpful? How so? How not?

In my interaction with Jeff, individually and in group settings, I find Jeff easy to approach, incisive and very cooperative. By way of example, there is a different tone and feel to department director meetings that has led to improved dialogue between all involved.

4. What would you encourage him to do more of? Less of?

I encourage Jeff to continue doing what I have highlighted above. I have no recommendations for "less of."

5. Do you have any other information you would like to offer which you feel would be of help to Jeff in his position? *No*

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1. Job knowledge: Has he gained familiarity with the County's procedures, regulations and issues as they relate to his role as County Administrator? Is he able to perform his duties effectively? Is there any other knowledge or experience he's used or should have used to help you or work with you?
Jeff is a fast learner and has gotten up to speed very quickly in the budget arena. He understands the issues and has gotten to know the Board members, Dept. Directors and Budget Committee members very well. As a result, I believe Jeff is performing his duties very effectively in the budget area.
2. Job quality: Is his work thorough and timely? Has it provided you with the assistance you've needed to do your job or fulfill your function?
Yes. Jeff's budget message, for example, was very thorough and much more detailed than previous messages. This message was an important aspect of the budget document and presentation to the Budget Committee.
3. Relationships: Do you find Jeff to be easily approachable, willing to listen and advise you on issues? Is he patient, tactful, cooperative, helpful? How so? How not?
Jeff is very approachable and maintains the same open door policy as did his predecessor. He listens very well, he is patient, tactful, cooperative and very helpful. We very much look forward to our weekly analyst meetings with Jeff where we can thoroughly and openly discuss pertinent issues that we need direction on in order for us to complete our work.
4. What would you encourage him to do more of? Less of?
Now that budget season is over look to the management analysts to help out with various other issues facing the county.
5. Do you have any other information you would like to offer which you feel would be of help to Jeff in his position?
None at this time.

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1. Job knowledge: Has he gained familiarity with the County's procedures, regulations and issues as they relate to his role as County Administrator? Is he able to perform his duties effectively? Is there any other knowledge or experience he's used or should have used to help you or work with you? **Yes, yes, no.**
2. Job quality: Is his work thorough and timely? Has it provided you with the assistance you've needed to do your job or fulfill your function? **N/A: Our interactions have not included any specific work product yet that would allow me to answer this question.**
3. Relationships: Do you find Jeff to be easily approachable, willing to listen and advise you on issues? Is he patient, tactful, cooperative, helpful? **How so? How not?** Yes, yes. He has a story or famous quote to fit every situation.
4. What would you encourage him to do more of? Less of? **More broad communication with employees on internal direction of the organization on a regular basis to help put him in touch with the "in the trenches" folks who don't feel a strong connection with him yet.**
5. Do you have any other information you would like to offer which you feel would be of help to Jeff in his position? **No**

MEMORANDUM

Date: July 16, 2008
TO: Board of County Commissioners, Greta Utecht, HR Director
FROM: Commissioner Bill Fleenor
RE: **Six Months Performance Review for Jeff Spartz**

1. Job knowledge: Has he gained familiarity with the County's procedures, regulations and issues as they relate to his role as County Administrator? Is he able to perform his duties effectively? Is there any other knowledge or experience he's used or should have used to help you or work with you?

Jeff has a vast bank of knowledge and skills, however, he also has a great gift of forgiveness, but he needs to have a stern fist when it comes to employee/program accountability.

2. Job quality: Is his work thorough and timely? Has it provided you with the assistance you've needed to do your job or fulfill your function?

Jeff has been very valuable at transitioning the county through dire economic times, but we need to have him provide more vision and leadership by offering up new solutions and opportunities to the Board, not just the re-cycled rhetoric of yesterday – but new ways and approaches to a goal oriented and fully accountable governance structure.

3. Relationships: Do you find Jeff to be easily approachable, willing to listen and both advise you and follow your direction on issues? Is he patient, tactful, cooperative, helpful? How so? How not?

Jeff is tactful, approachable and willing to listen, but he needs to be more demanding and insistent that staff follow Board directions and all policies and procedures to the letter of the law.

4. What would you encourage him to do more of? Less of?

Less following and more leading – ensure staff is only used as advisors to the Board and not final deciders.

5. Do you have any other information you would like to offer which you feel would be of help to Jeff in his position?

Do not be fearful of making fundamental changes through reorganization and reallocation of resources at all levels of Lane County Government. Be bold and creative; do not be afraid to explore new ideas and approaches.