

RICHARD L LATHEM
PERFORMANCE EVALUATION
PERIOD 12/23/2008 THRU 12/23/2009

AS PREPARED & REVIEWED BY MICHAEL A HENDERSON (12/14/2009)

AND APPROVED BY LINDA PRYOR (12/18/2009)

PLEASE SEE LINK:

**INVESTIGATION OF SEXUAL HARASSMENT
COMPLAINT FINDINGS AS GATHERED BY
SAM S. HARBEN, JR., ATTY. AT LAW**

**NOTE: THERE IS NO MENTION OF INDECRETIONS
IN THIS REVIEW.**

**PERFORMANCE EVALUATION REPORT
TO BE COMPLETED IN ACCORDANCE WITH THE
PERFORMANCE EVALUATION HANDBOOK AND
INSTRUCTIONS ON COVER SHEET**

Administrative Services Employees

Employer:

PART I. GENERAL INFORMATION		Department/Division	
Employee's Name: RICHARD L. LATHEM 2803		110 - TAX ASSESSORS PERSONAL PROPERTY	
Social Security Number		Job Title/Position Number	
		PERSONAL PROPERTY AUDITOR/SUPERVISOR	
Date of Employment	Present Grade & Step	Status	Evaluation Period From
1/27/97	24	Civil Service	12/23/2008 to 12/23/2009
This report must be submitted to Human Resources by: 12/9/08	Type of Evaluation:	() Probationary () Special	(X) Annual/Semi Annual () Separation

PART II. JOB FACTORS

A. Technical Competence

1. Oral Communication Skills

- a. Speaks in an understandable voice.
- b. Conveys information clearly.
- c. Answers questions clearly.
- d. Is courteous.
- e. Listens attentively to others.

Level of Performance Comments/Examples

- a. 4
- b. 5
- c. 5
- d. 5
- e. 5

2. Written Communication Skills

- a. Writes legibly.
- b. Records accurate information
- c. Presents facts clearly & concisely.
- d. Provides required information.
- e. Uses correct grammar & punctuation.
- f. Submits reports on time.

- a. 4
- b. 4
- c. 5
- d. 4
- e. 4
- f. 5

3. Typing Skills

- a. Meets speed requirements.
- b. Proofreads & corrects so that final version is error-free.
- c. Follows standard format.
- d. Meets deadlines.

- a. N/A
- b. N/A
- c. N/A
- d. N/A

4. Filing and Record-keeping Skills

- a. Sorts material accurately.
- b. Files materials within requested time frame.
- c. Files materials so that it is easily located.
- d. Maintains accurate records.

- a. N/A
- b. N/A
- c. N/A
- d. N/A

5. Dictation Skills

- a. Meets speed requirements.
- b. Transcribes accurately.

- a. N/A
- b. N/A

DISTRIBUTION:

Human Resources/Original _____
Employee File/C.I. Copy _____
Employee Copy _____

L. Puyon
12/10/09

JOB FACTORS (continued)

	Level of Performance	Comments/Examples
6. Support Activities		
a. Operates office machines correctly.	a. <u>4</u>	
b. Schedules appointments/meetings accurately.	b. <u>5</u>	
c. Coordinates work with other.	c. <u>4</u>	
d. Follows up on work orders, job orders, requests, or other needed information.	d. <u>5</u>	
B. Interpersonal Relations		
1. With the General Public		
a. Displays tact & consideration.	a. <u>4</u>	
b. Listens to complaints.	b. <u>4</u>	
c. Takes time to respond to questions.	c. <u>5</u>	
d. Displays willingness to help.	d. <u>5</u>	
2. With Other Employees		
a. Carries own share of workload.	a. <u>5</u>	
b. Helps others when workload is heavy.	b. <u>5</u>	
c. Displays tact and consideration.	c. <u>5</u>	
C. Responsibility Acceptance		
1. Work Habits		
a. Reports to work on time.	a. <u>5</u>	
b. Observes work hours.	b. <u>3</u>	
c. Carries assigned workload.	c. <u>5</u>	
d. Works effectively under pressure.	d. <u>5</u>	
e. Conforms to departmental rules and procedures.	e. <u>3</u>	
2. Career Development Capacity		
a. Shows initiative on the job.	a. <u>5</u>	
b. Understands new concepts.	b. <u>5</u>	
c. Engages in self-improvement activities.	c. <u>4</u>	
d. Accepts added responsibilities when necessary.	d. <u>5</u>	
e. Shows potential for promotion	e. <u>5</u>	

PART III: SUPERVISORY FACTORS

A. Supervision Ability		
1. Assigns work fairly.	1. <u>5</u>	
2. Observes & evaluates employee job performance.	2. <u>4</u>	
3. Solves employee problems.	3. <u>5</u>	
4. Insures compliance with rules and regulations.	4. <u>5</u>	
5. Coordinates work of employees.	5. <u>5</u>	
6. Trains new employees.	6. <u>N/A</u>	
7. Maintains contact with other divisions.	7. <u>5</u>	
8. Requisitions material/equipment in a timely & proper manner.	8. <u>N/A</u>	
9. Monitors work done by employees.	9. <u>5</u>	
10. Makes sure work deadlines are met.	10. <u>5</u>	
11. Relays necessary information.	11. <u>5</u>	

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III. SUPERVISORY FACTORS (continued)

	Level of Performance	Comments/Examples
B. Management Ability		
1. Plans & manages time of self.	1. <u>5</u>	
2. Implements policies & procedures.	2. <u>5</u>	
3. Sets & meets goals & objectives.	3. <u>4</u>	
4. Anticipates problems.	4. <u>5</u>	
5. Assumes added responsibilities when necessary.	5. <u>5</u>	

PART IV: OVERALL EVALUATION

A. Employee's strengths: OFFICE MANAGEMENT, WORK SCHEDULING, EMPLOYEE SUPERVISION & EMPLOYEE PROBLEM SOLVING ARE SEVERAL OF RICHARD'S STRONG AREAS.

B. Areas needing improvement:

C. Recommended development activities: Obtain Appraiser IV certification

D. Overall rating of employee: Level 1 () Level 2 () Level 3 () **Level 4 (X) 4.65** Level 5 ()

E. Salary Recommendation: Date Eligible for increase:

- (X) Recommend merit increase () Recommend special increase () Not applicable
 (X) Will consider merit increase after No Budgeted increases for 09 () Recommend NO merit increase

PART V. CERTIFICATION

I have read this report and discussed it with my supervisor/department head. I have reviewed the _____ page(s) of the attached performance appraisal instrument and I have made any comments I wish in the "Employee Comments" section. My signature does not necessarily indicate agreement with the appraisal.

Signature of Employee Richard Lutton Date 12-14-09

Employee Comments _____

This rating reflects my appraisal of the employee's job-related performance and is based on personal knowledge of his/her work. I have discussed this appraisal with the employee. If applicable, the employee has an understanding of his/her eligibility for a salary increase.

Signature of Director/Supervisor _____ Date _____

I approve this appraisal for inclusion in the employee's permanent personnel file.

Signature of Department Head [Signature] Date 12-14-09

PERFORMANCE LEVELS

- Level 1 **PERFORMANCE UNACCEPTABLE** – Consistently fails to meet acceptable standards. Substantial improvement required.
- Level 2 **PERFORMANCE MARGINAL** – Occasionally meets acceptable standards. Performance frequently below expected standard and needs improvement.
- Level 3 **PERFORMANCE AVERAGE** – Meets standards. Work overall acceptable; rarely needs improvement.
- Level 4 **PERFORMANCE ABOVE AVERAGE** – Consistently meets acceptable standards; frequently exceeds standards in quality and quantity of work performed.
- Level 5 **PERFORMANCE OUTSTANDING** – Consistently exceeds standards in both quantity and quality of work performed.

[Signature]
12/18/09