OFFICE OF COUNTY MAYOR TIM BURCHETT
Department of Human Resources
400 Main Street, Suite 360, Knoxville, TN 37902

To: Mayor Tim Burchett, Knox County Mayor
Chris Caldwell, Knox County Finance Director

From: Mark Jones, Knox County HR Director / Risk Manager
Richard Julian, Knox County HR Manager

Date: October 12, 2016

Re: Recommendations per Janice Orr's complaint against Hugh Holt and Matt Myers

There are four types of allegations by Janice Orr against Hugh Holt:

1. Disparity in pay;
2. Softball team golf tournament fund raiser, county vendor conflict-of-interest, and use of county equipment for golfing event;
3. Retaliation and intimidation between May 4, 2016 and August 23, 2016; and
4. Hostile work environment harassment.

There are two types of allegations by Janice Orr against Matt Myers:

1. Retaliation and intimidation between May 4, 2016 and August 23, 2016; and
2. Hostile work environment harassment.

1. Disparity in Pay:

In the initial discussion with Janice on August 23, Janice discussed unequal pay between the women and men in the purchasing department. Janice believed Hugh discriminated in how raises were given between the men and the women. [Notes].

In the interview with Janice on September 12, her concern was more about her pay inequity and not about departmental pay differences between men and women. [August 24 Memo, notes].

Per the interviews of [redacted] Hugh Holt, [redacted], and others:

- Major conflict existed between [redacted] and Janice Orr.

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- Unclear analysis of Janice Orr job duties and salary by the former human resources compensation analysis employee [redacted]

Recommendation: Request compensation consultant Lou Rabinowitz evaluate Janice Orr's position, job duties/job description with the market matrix survey utilized by Knox County for determining salary ranges. If a pay disparity is found, change Janice's salary to reflect the market rate and back pay from the date of the promotion.

2. Hugh Holt's softball team golf fund raiser.

Key interviews: Hugh Holt, [redacted], [redacted], and [redacted]. Several other employees were questioned regarding their knowledge about work time and the county truck being used for the event.

A) Allegation that the softball team golf fund raiser was done on county time and a county truck or equipment was used.

- [redacted] confirmed that he requested [redacted] make labels for the golf fund raiser, however the labels were not made.
- [redacted] and Hugh Holt denied using the county vehicle or any county equipment for the golfing event.
- No witnesses interviewed had knowledge of the county truck or county equipment being used.
- One witness heard [redacted] talking on the phone in the office about the golf tournament fund raiser.

B) Allegation that Three Ridges gave better discounts to Hugh's participants in the fund raiser.

Mark Brown said that Three Ridges charged Hugh's softball team exactly what he charged other organizations that are not non-profits, $37.50 per player. Mark said the non-profit rate was about $25 per player. Mark said that nothing extra was done for Hugh's softball team at Three Ridges, in fact he stated he did less to help than he does for other organizations.

Mark Brown said that Hugh Holt set up the tournament.

C) Allegation that a conflict-of-interest occurred because county vendors participated. County vendors who participated according to the interviewees were: Trane, UPK, BarberMcMurry Architects, McCarty Architects, and Denark Construction.

More investigation is needed to determine if there are other vendors who participated. More investigation is needed to determine if by participating in Hugh Holt's softball team's golf tournament vendors had an advantage or would believe that by participating would provide an advantage in bidding on county contracts.

Finding: A conflict-of-interest is not confirmed, but when registered county vendors participate in an event that provides financial support for employees, there is at minimum an appearance of a conflict-of-interest.

Employees working on the event during work hours or use of county equipment is not confirmed.

Recommendation: Eliminate all fund raising activities in the purchasing department that provide support for employee activities.

3. Retaliation and intimidation:

1) On January 29, 2016, Janice met with Dean Rice. According to Janice she told Dean about the harassment. [Email February 3 to Dean from Janice confirmed the meeting].

2) On February 2, 2016, Dean, Chris, Richard and Hugh met and discussed moving the P-Card Program to Finance. According to Chris: "her [Janice's] meeting with Dean expedited the move".

3) Dean and Chris did not restrict Hugh or Matt's phone, email, or text contacts with Janice or the P-Card Program.

4) Hugh and Matt continued to have oversight of the P-Card Program. [Ordinance requirement per Hugh and Chris].

5) From January 29 through May 4 Janice was in the purchasing department. Janice moved to finance (C/C Building) on May 4.

6) Jeff Clark became Janice's supervisor for the P-Card Program when she moved to the C/C on May 4. Jeff was not informed of the harassment allegations, at least not in detail.

7) The emails provided to me by Janice on August 23 do not show from a reasonable interpretation any direct retaliation or intimidation:
    1) Matt's email:
    One from Matt dated June 13, 2016: "Is this something that goes out every month? Sure is a nice reminder."

2) Hugh's email:
June 27, 2016: "What is the charge for $385.99? It's one of my accounts."

Hugh's text:
Date is uncertain. "Hey did an interview with News Sentinel this evening. Threw in a plug for the ECARD program. Article about active shooter vests. Told them we used card in order to be the first agency in our area to purchase. Also filled them in on rebate and cist avoidance."

Recommendation: None. The retaliation and/or intimidation allegations are not reasonable under the above mentioned timeline or events and the documents provided.

4. Hostile work environment harassment:

1) Janice alleged that Hugh called her "butch" at work. Confirmed by interviews with [redacted] and [redacted].

2) Janice alleged that Hugh called her a "lesbian" at work. Confirmed in interviews with [redacted], and [redacted].

3) Janice alleged that Hugh signed all her old boyfriends' names to a birthday card at her birthday celebration in purchasing. Confirmed by [redacted], and the incident happened before 2012.

4) Janice alleged that Hugh referred to her and [redacted] as "James and Ronnie". Hugh wrote it on [redacted] birthday card on October 11, 2015. Joked that same-sex marriage is now legal in Tennessee and no reason for Russ and Janice to go to Washington to get married. Confirmed by [redacted], and [redacted].

No witness was aware of Matt being involved in these incidents.

5) Janice alleged that Hugh referred to her mode of dress in a gay context. Confirmed by [redacted] and [redacted].

6) Janice alleged that Matt called her Honey Boo Boo. According to Janice the reference is because of her height and weight. Confirmed by Matt Myers (admitted calling her Honey Boo Boo but gave a different reason than Janice believed), [redacted], and [redacted].
Matt admitted to not stopping the name calling when Janice ask him to stop.

7) Janice did not allege that Hugh called her Honey Boo Boo, but two other employees said they heard him call her that. Confirmed by [redacted] and [redacted].

8) Janice alleged that Hugh sent her packages of under pads or adult diapers to her office with the messages "use these – you smell of urine", "you smell of urine". Not confirmed. Hugh denies this allegation. However, based on Hugh's own statement in the interview regarding what happen to Janice at his house and [redacted] explanation of these events, it is more likely than not that Hugh was involved in Janice receiving the messages and diapers at work.

9) Janice's request for the name calling and behavior to stop, and her participation in certain incidents:

   a) April 16, 2015 10:34 AM email (and other emails in this list) from Janice to Hugh state: "I feel like I am being harassed by you and Matt. The jokes and insults need to stop now." [Personnel file].

   b) Most witnesses who heard or observed these incidents confirmed that Janice was upset, very upset or hurt by these incidents.

   c) There are also witnesses who said that Janice replied to Hugh by calling him various names.

Recommendation: 1) Hostile work environment harassment for Janice Orr is confirmed and the conduct which created the harassment was by the department director Hugh Holt.

   a) All employees must understand that work place harassment will not be tolerated by Knox County. *Knox County Employee Handbook* policy: "It is the policy of Knox County Government that verbal or physical conduct by any employee that harasses, disrupts, or interferes with another's work performance or that creates an intimidating, offensive, or hostile environment will not be tolerated." "Any employee, supervisor, or director who is found to have engaged in harassment of another employee will be subject to appropriate disciplinary action, up to and including discharge."

   b) Consistency in disciplinary actions taken for similar director level employee behavior previously: [redacted] in 2012, [redacted] in 2013.

   c) Terminate Hugh Holt's employment with Knox County.

2) Matt Myers: This recommendation is based on one confirmed allegation by Janice Orr against Matt Myers, that Matt called her Honey Boo Boo over a period of time. Matt admitted this allegation in his interview. Matt also admitted that he did not stop calling her this name when Janice ask him to stop.

   Recommendation is a written warning to be placed into his personnel file.

TO: Mark Jones
FROM: Janice Orr
Date: August 24, 2016
RE: Meeting on August 24, 2016 at 1:30

CC: Janice Orr's personnel file

Matt Myers called me Honey Boo Boo for months after me continually to tell him stop. He just laughed and thought it was funny to call me names in front of people. He even printed a picture and put it on my desk for me to find. This was an attempt to humiliate me by making fun of my height and weight. I have a documented [redacted].

Matt Myers accused me for falsifying my time sheet. Which is a defamation of my character. Co-Worker and I had a NIGP class in Virginia. I had left early Monday morning because of an appointment.
I had already worked 48 hours. He wanted charge me three more hours of my sick time. This is a few of many.

Matt Myers on countless occasions made off-hand remarks to me "why do you care it's not your tax dollars you don't even live in Knox County" I have sent him countless e-mails and communicated to him it does not matter to me. I may not be a Knox County tax payer but I want to do my job. He has told be on countless times that I needed to learn I am not in the private sector any longer that things are done differently in the public sector.

I was out [redacted] and I had a ball game that night. Matt Myers told Hugh Holt that he was going to drive over to Blount County Parks and Recreation and if I was playing he was going to fire me on the spot. Of course I was [redacted] and was not there.

Hugh Holt has called me a lesbian and butch for years on a daily basis to my face. I believe it is rooted from [redacted] being gay.

I was told by Hugh Holt that I looked like [redacted] when I wore pant suits. Of course, to please Hugh I stopped wearing the pant suites and began to wear shirt suits. Maybe I would not be made fun of that day.

My first Birthday Card from the group in the Procurement Office had listed all the past former boyfriends prior to my marriage. Hugh Holt wrote the names on the card in attempt embarrass me in front of my co-workers. Several past and present Knox County Employees that can support that level of harassment I have received over the years. The people listed have witnessed the harassment and some cases been a part of it.

[redacted], [redacted], [redacted], [redacted], [redacted], [redacted], [redacted], [redacted], [redacted], [redacted], [redacted], [redacted], [redacted], [redacted], [redacted], [redacted], [redacted] and [redacted].

[redacted]'s Birthday Card was signed from Ronnie and James. Two made up names from Hugh Holt, which were intended to be me and [redacted]. The joke that Hugh Holt and Matt Myers started was we didn't need to get married in Washington, DC because same sex marriage was allowed in Tennessee. I walked into the back of the office overhearing this joke and Hugh, Matt and [redacted] laughing. I immediately walked away. [redacted] followed me back to my office. [redacted] wanted to tell me that he didn't mean anything by it. At that time I communicated to [redacted] how hurtful the names and being made fun of was wrong. I communicated that I wanted it to stop.

On my last birthday in the Procurement office the birthday cake had the name Janet on it. I did post it on my Facebook account to show proof of the insult.

One day I was signing a card in front of [redacted]. I started with the letter "J" of my name. Hugh Holt's comment was that "J" is a big as your ass.

[redacted] was told from [redacted] that it would not be a good idea to hire me because I was an attractive woman. It would cause too many issues.

I was mailed via the Knox County School interoffice mail Poise pads with a note that I smelled of urine.

I was mailed via the Knox County Schools interoffice mail Adult Underpads with a hand written note from Hugh Holt "Use these you smell of urine"

Hugh Holt once drew me a note that started out with UT then he added B in front of the UT and T H afterwards. Which spelled BUTCH. He said that he almost bough me a shirt at Food City. It had BUTCH on the front of it.

I was told to quit if I did not like my salary. [redacted] left Knox County at 59K. I was hired at 40K with 15 years of work experience. As other Men in the office have received 5,000 to 10,000 dollars raises each year. When my job was evaluated it was done by [redacted]. I was told that [redacted] had stuck it to me one more time before she left and my evaluation did not come out to what was expected. Richard Julian communicated to me that he told Hugh that I at least needed a step raise because I had never received one. I would like my job revaluated and my procurement coordinator position revaluated. I feel that because we are woman that it was never graded fairly based upon our work experience and how well we did our job.

I was told by Hugh Holt if the job was too stressful that I needed to find another job.

I have been told I was delirious by Hugh Holt

I have been told that while I was filing my nails that Hugh worked.

Hugh Holt sent a note to me that I needed a professional certificate to be a professional. I told him that there are plenty of people here with a certificate that were not professionals.

Hugh Holt and [redacted] had a golf fund raiser. They called upon the Knox County vendors and others to participate. [redacted] at Three Ridges gave them a discounted rate for the fund raiser. This fund raiser was for Hugh and [redacted] to pay their entrance fees to play slow pitch softball. Hugh Holt uses his position to intimidate his employees, and Knox County vendors. [redacted] and Hugh Holt took the County Truck to collect gifts and money from friends and Knox County vendors. [redacted] asked [redacted] my coordinator to make labels for the giveaways for this fund raiser. [redacted] was not acting her normal self and came to me about what [redacted] had asked her to do. Use Knox County labels on Knox County time for a personal project for Hugh and [redacted]. I immediately texted [redacted]'s supervisor of the issue. I told him that no [redacted] would not do what [redacted] asked her to do. I later when to speak with [redacted] he understood it was wrong and communicate to [redacted] that it was indeed wrong. I made the comment to [redacted] [redacted] I wonder what Dean Rice would think about Hugh's fund raiser. I left [redacted]'s office and immediately Hugh Holt walked into my office saying he told [redacted] it was wrong. Then 30 minutes later Hugh was asking me if Jeff Clark had went to Dr. Lou about my new job description that it could lead to an increase in salary. I never asked Jeff Clark for anything. I knew that Hugh was trying to get my mind off the incident with money.

On many occasions throughout the years Hugh has gotten the "guys" in the office to go shag balls for him during work hours. But only the guys that do play slow pitch softball. [redacted], [redacted], [redacted], etc.

NOTE: I asked Dean Rice to relocate me from this harassment. I have been moved but the harassment continues. The intimidation and the fear has continued. The only thing that can make this County a better place to work is to ask for a full investigation into this matter of harassment from Hugh Holt and Matt Myers.

Glenda Irwin

From: Janice Orr
Sent: Wednesday, August 24, 2016 11:51 AM
To: Glenda Irwin
Subject: Janice Orr August 23, 2016
Attachments: Janice Orr August 23, 2016.docx

Importance: High

Glenda – Please put this letter in my personnel file. I gave this letter Mark Jones on August 22, 2016.

Thank you,
Janice Orr

August 23, 2016

Regarding: Official Complaint

Dear Mr. Mark Jones:

Mark,

I am coming to you for assistance on an ongoing issues with Hugh Holt and Matt Myers. On February 2, 2016, I discussed with Dean Rice the harassment issues I have endured for many years now. The very next morning I met with Chris Caldwell with instructions to uproot the E-Card Program from Procurement which involved us moving from the Central Office Location to the city/county building and work for the Finance Department. This move was due to the hostile work environment of the Knox County Procurement Office under Hugh Holt and Matt Myers. The E-Card Program was to be moved under Jeff Clark, Director Financial IT and Compliance in Finance. On February 18, 2016, I asked Jeff Clark to announce the move due to rumors and slander. I felt that it was necessary to be open about the move.

I was promised by Dean Rice that no retaliation would happen. Since, the move I and [redacted] have had continuous calls and e-mails requesting of a demanding nature. Also, Hugh Holt and Matt Myers will not release the E-Card Policy and Procedures to Jeff Clark. [redacted] added the E-Card Program to the Finance website and then Matt Myers requested it be changed back to the Procurement office. Later, The Procurement Office felt that the E-Card policies and procedures should be left to the Procurement Office for integrity issues. I feel that they are holding the E-Card Policies and Procedures for retaliation, reaction, or attention.

We have been more than tolerable regarding this situation. I am asking for the County to react to my request of the harassment by Hugh Holt and Matt Myers. It has come to my attention that [redacted] and other key personnel in the Procurement office has made slanderous statements about myself, my employee ([redacted]) and the E-Card Program.

This continues to exasperate the for mentioned hostile work environment of the Knox County Procurement office. All though we strongly feel although, We (Janice Orr and [redacted]) were an asset to Knox County Procurement Office the only option was to move us out due to others demeaning behavior's. We are extremely happy in the Knox County Finance office and have been welcomed with open arms by this team but we are unable to completely be free of the issue of the hostile work environment of the Knox County Procurement office. The weekly intimation causes a hardship on us as individual employees here at Knox County. We strive to be our best and grow as individuals and provide the best service for our departments and the tax payers.

Mayor Burchett campaigned on the fact that he wanted the Knox County Employees to be proud of their jobs. This type of work harassment environment is not something that Mayor Burchett would want his employees to endure. This type of sexual and gender based harassment should never be accepted in any work environment. This has happened to me, my

pervious employee [redacted], my program coordinator and of course she was moved out because of their bad behaviors. This office must be investigated and Matt Myers and Hugh Holt need to seek behavior management classes or some type of behavioral counseling.

Sincerely,

Janice Orr

Glenda Irwin

From: Janice Orr
Sent: Friday, July 01, 2016 10:43 AM
To: Glenda Irwin
Subject: FW: Credit Card Manuel

Please put in my file

From: Janice Orr
Sent: Friday, July 01, 2016 9:53 AM
To: Jeff Clark <jeff.clark@knoxcounty.org>; Lori Holmann <lori.holmann@knoxcounty.org>
Cc: Chris Caldwell <chris.caldwell@knoxcounty.org>
Subject: RE: Credit Card Manuel

Jeff/Lori – No changes necessary on my side. I just wanted to send an editable copy to Stephanie Welch so she didn't have to re-create the wheel. Just trying to be nice. ☺

Thank you,
Janice Orr

From: Jeff Clark
Sent: Friday, July 01, 2016 9:45 AM
To: Lori Holmann <Lori.Holmann@knoxcounty.org>; Janice Orr <Janice.Orr@knoxcounty.org>
Cc: Chris Caldwell <Chris.Caldwell@knoxcounty.org>
Subject: Credit Card Manuel

Purchasing is understandably interested in maintaining the integrity of the documents they have created. That is why they are hesitant to send out editable versions of them. Feel free to mark up a pdf version and submit back to them for revision if you suspect we need to change something.

We have probably not done a great job determining exactly which responsibilities reside with which department. We will have a conversation along those lines shortly.

Until then, it's safe to assume that nothing changes unless we have specifically mentioned it changing. Purchasing remains in charge of anything they used to, until we specifically outline a change of duties. It's may be logical to assume a change of various functions with all the moving around we've done, but until we hammer out things in detail, there's no need to fix anything that isn't broken.

Thanks
Jeff Clark

Glenda Irwin

From: Janice Orr
Sent: Friday, July 01, 2016 10:44 AM
To: Glenda Irwin
Subject: FW: Credit Card Manuel

Please put in my file

From: Janice Orr
Sent: Friday, July 01, 2016 9:58 AM
To: 'Jeff Clark' <jeff.clark@knoxcounty.org>; (chris.caldwell@knoxcounty.org) <chris.caldwell@knoxcounty.org>
Subject: FW: Credit Card Manuel

Feeling sad that things have to be this way. ☹ I have really worked so hard for this program to be a successful. I feel that Hugh is going to attempt to destroy the program with his vindictive nature. I can't win against him.

From: Jeff Clark
Sent: Friday, July 01, 2016 9:45 AM
To: Lori Holmann <Lori.Holmann@knoxcounty.org>; Janice Orr <Janice.Orr@knoxcounty.org>
Cc: Chris Caldwell <Chris.Caldwell@knoxcounty.org>
Subject: Credit Card Manuel

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Thanks
Jeff Clark

Glenda Irwin

From: Janice Orr
Sent: Tuesday, July 05, 2016 9:15 AM
To: Glenda Irwin
Subject: FW: Credit Card Manuel

Please put in my file

From: Jeff Clark
Sent: Friday, July 01, 2016 9:45 AM
To: Lori Holmann <Lori.Holmann@knoxcounty.org>; Janice Orr <Janice.Orr@knoxcounty.org>
Cc: Chris Caldwell <Chris.Caldwell@knoxcounty.org>
Subject: Credit Card Manuel

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We have probably not done a great job determining exactly which responsibilities reside with which department. We will have a conversation along those lines shortly.

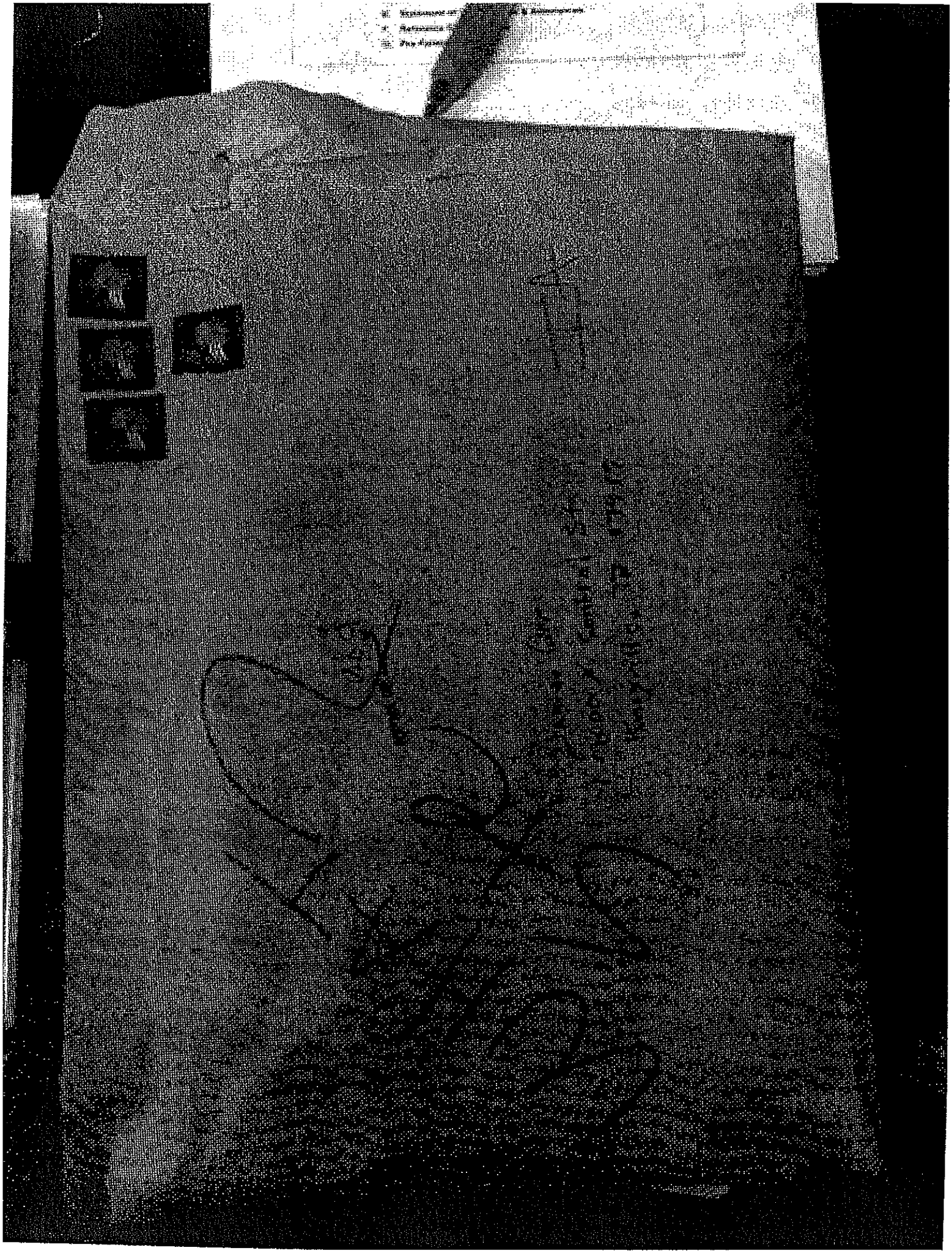
Until then, it's safe to assume that nothing changes unless we have specifically mentioned it changing. Purchasing remains in charge of anything they used to, until we specifically outline a change of duties. It's may be logical to assume a change of various functions with all the moving around we've done, but until we hammer out things in detail, there's no need to fix anything that isn't broken.

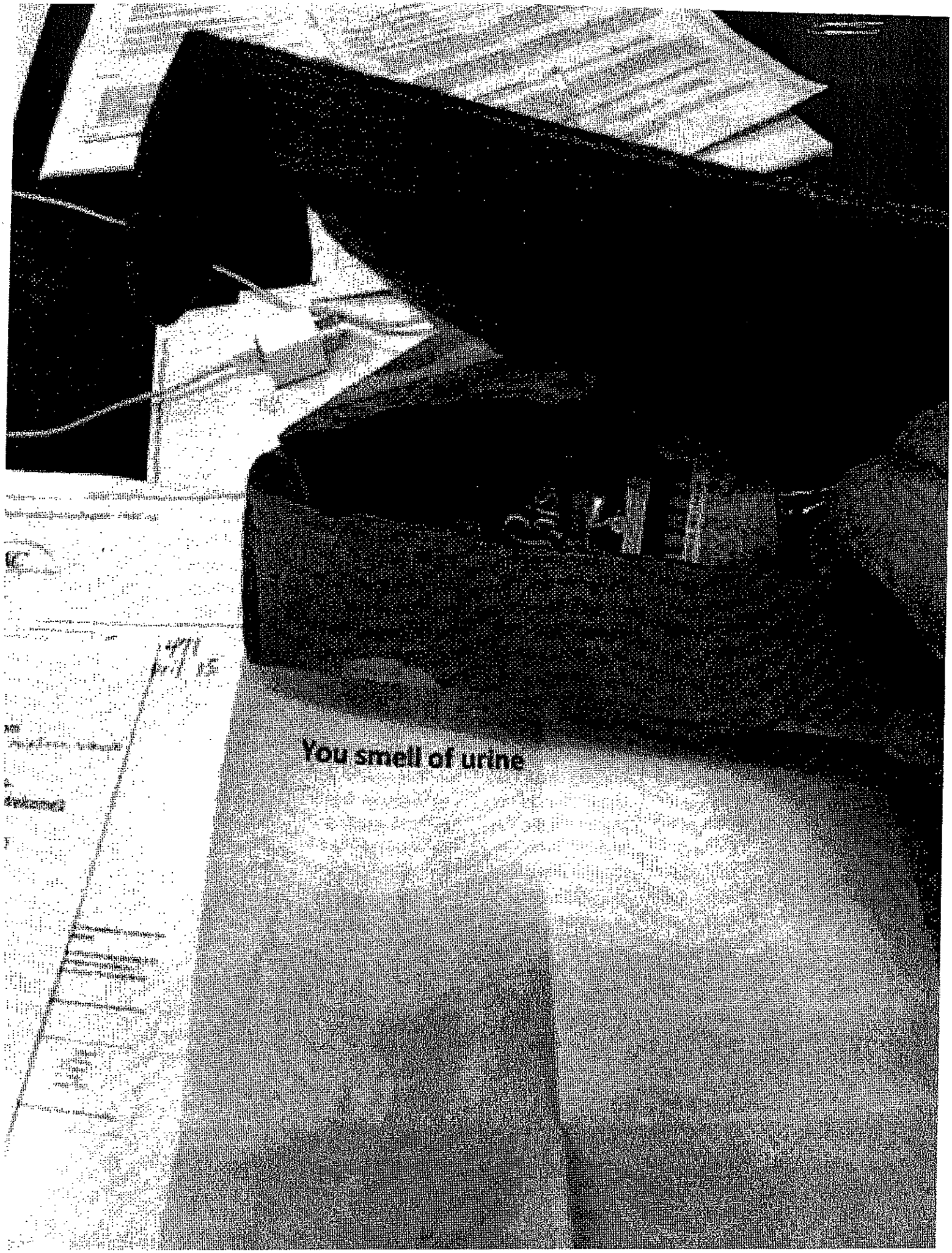
Thanks
Jeff Clark

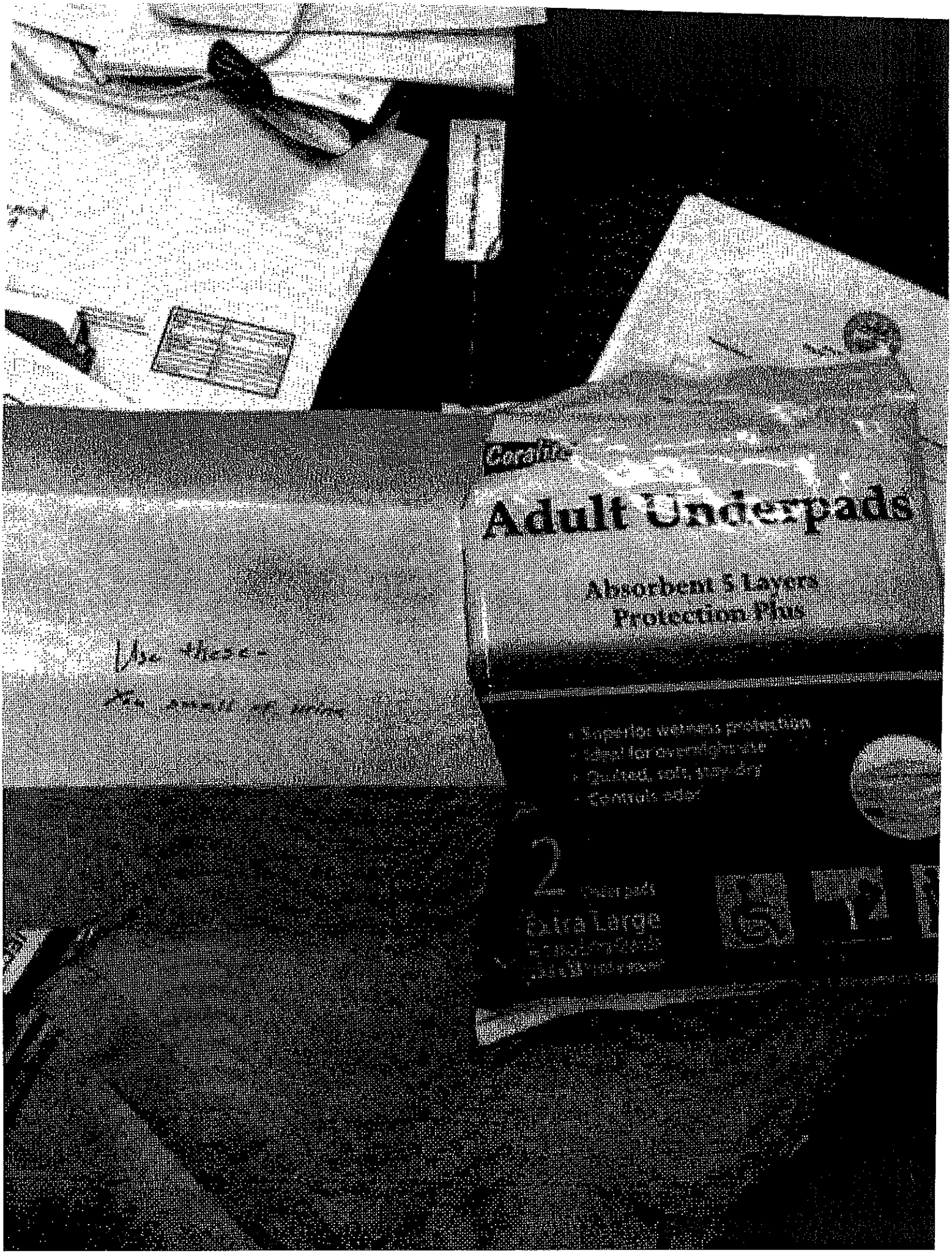
Glenda Irwin

From: Janice Orr <janiceorr79@yahoo.com>
Sent: Tuesday, December 15, 2015 2:47 PM
To: Glenda Irwin
Subject: File
Attachments: IMG_0555.JPG; ATT00001.txt

Glenda - I received two inter office boxes today in the inner office school mail. Please place in my confidential file.




You smell of urine


Adult Underpads
Absorbent 5 Layers
Protection Plus

Glenda Irwin

From: Janice Orr
Sent: Thursday, November 12, 2015 1:23 PM
To: Glenda Irwin
Subject: RE: [redacted]

Add to my file please

From: Hugh Holt
Sent: Tuesday, November 10, 2015 8:38 AM
To: Janice Orr <Janice.Orr@knoxcounty.org>
Cc: Matt Myers <Matt.Myers@knoxcounty.org>
Subject: RE: [redacted]

Me too but I'm own my way to work. Us essential employees can't be out every time we break a nail.

Sent from my U.S. Cellular® Smartphone

-------- Original message --------
From: Janice Orr <Janice.Orr@knoxcounty.org>
Date: 11/10/2015 7:20 AM (GMT-05:00)
To: Hugh Holt <Hugh.Holt@knoxcounty.org>
Subject: [redacted]

Hugh - i will be out[redacted] today. I have tried all morning to[redacted]. Too much [redacted].

Sent from my iPhone

Janice Orr

From: Janice Orr
Sent: Friday, July 17, 2015 11:12 AM
To: Matt Myers
Subject: Request for [redacted] leave

July 17, 2015

Matt –

I am writing to you to submit a formal request for a [redacted] leave of absence due to my [redacted] that requires [redacted]. My [redacted] has scheduled a [redacted] for August 18, 2015 and expects that I will need 2-4 weeks for [redacted] to return to work. My [redacted] will be happy to provide a formal [redacted] document on my behalf.

Thank you in advance for your consideration.

Sincerely,

Janice

Janice Orr
Program Manager/Buyer
Knox County Purchasing Division
1000 N. Central Street, Suite 100.
Knoxville, TN 37917
865-215-5769 O

Glenda Irwin

From: Janice Orr
Sent: Wednesday, May 06, 2015 10:01 AM
To: Glenda Irwin
Subject: CONFIDENTIAL

From: Janice Orr
Sent: Thursday, April 16, 2015 1:47 PM
To: Russ Lonas
Subject: Fwd: Vacation May 29-June 6

Print this and bring it to me.

Sent from my iPhone
Janice Orr

Begin forwarded message:

> **From:** Janice Orr <Janice.Orr@knoxcounty.org>
> **Date:** April 16, 2015 at 1:45:05 PM EDT
> **To:** Hugh Holt <Hugh.Holt@knoxcounty.org>
> **Subject: Re: Vacation May 29-June 6**
>
> Hugh - I am not delirious! Trust me I would rather be at work than being [redacted]. What I do or do not do after hours is no one business. Joking or not it is very disrespectful. I take my job very seriously and do a dang good job. People get[redacted]. I shouldn't be accused of being hung over from a Saturday night... When I was at home in bed. People around there sure throw rocks in a glass house. I can't stop people from talking about others but it would be nice if they got it straight every now and then.
>
> Sent from my iPhone
> Janice Orr
>
> On Apr 16, 2015, at 11:47 AM, Hugh Holt <Hugh.Holt@knoxcounty.org> wrote:
>
> > You need to rest, you sound dilirous. Rest and get better. We need you here. I'll talk to Matt about your perception of his treatment of you.
> >
> > Sent from my U.S. Cellular® Smartphone
> >
> > -------- Original message --------
> > From: Janice Orr <Janice.Orr@knoxcounty.org>
> > Date: 04/16/2015 11:18 AM (GMT-05:00)
> > To: Hugh Holt <Hugh.Holt@knoxcounty.org>
> > Subject: Re: Vacation May 29-June 6

I love you as if you are my blood. I work very hard and I have been[redacted] with [redacted]. I spent 6 hours in the[redacted] with [redacted]. I tried to work today but[redacted] I shouldn't have to be treated this way. Matt sends me an email about blue tick brewery on Saturday night? I was in bed[redacted]! I still answer my phone when work calls. I am doing above and beyond. It is very hurtful to me.

Sent from my iPhone
Janice Orr

On Apr 16, 2015, at 11:06 AM, Hugh Holt <Hugh.Holt@knoxcounty.org> wrote:

> Sounds like your really[redacted]. You need to rest and get better.
>
> Sent from my U.S. Cellular® Smartphone
>
> -------- Original message --------
> From: Janice Orr <Janice.Orr@knoxcounty.org>
> Date: 04/16/2015 11:04 AM (GMT-05:00)
> To: Hugh Holt <Hugh.Holt@knoxcounty.org>
> Subject: Re: Vacation May 29-June 6
>
> I don't believe it's my perception. I don't complain about my compensation. You told me to do a new job description. It's been several months to be completed. If you treated people equally then if others left work or was sick would get such emails or comments like I do. Not sure how a director would give an employee a very good on their review if they did not meet their goals.
>
> Sent from my iPhone
> Janice Orr
>
> On Apr 16, 2015, at 10:46 AM, Hugh Holt <Hugh.Holt@knoxcounty.org> wrote:
>
> > May be you should find another place to work. No one is treating you any different than anyone else. I think that's your perception not reality. Your are held to the same standards as the rest of the professional staff.
> >
> > You constantly complain about compensation but have failed to meet your annual goals the past 3 years. It's hard for me to lobby for your cause.
> >
> > I was not kidding about stress equating to[redacted]. If your[redacted], your[redacted]and you should seek[redacted] [redacted]and rest.
> >
> > Just trying to help.

Sent from my U.S. Cellular® Smartphone

-------- Original message --------
From: Janice Orr <Janice.Orr@knoxcounty.org>
Date: 04/16/2015 10:34 AM (GMT-05:00)
To: Hugh Holt <Hugh.Holt@knoxcounty.org>
Subject: Re: Vacation May 29-June 6

Hugh - I have documentation from [redacted]. Matt told me to go back home. You are really being mean to me. I know you have higher expectations from me but it's unacceptable to hold me accountable to goals that are not written down for me to meet. Annual training is stated once a year. Does not specify a time period. I have never thought of myself as a failure of any kind. I feel like I am being harassed by you and Matt. The jokes and insults need to stop now.

Sent from my iPhone
Janice Orr

On Apr 16, 2015, at 10:20 AM, Hugh Holt <Hugh.Holt@knoxcounty.org> wrote:

> Did you go home[redacted] again?
>
> Sent from my U.S. Cellular® Smartphone
>
> -------- Original message --------
> From: Janice Orr <Janice.Orr@knoxcounty.org>
> Date: 04/16/2015 10:18 AM (GMT-05:00)
> To: Hugh Holt <Hugh.Holt@knoxcounty.org>
> Subject: Re: Vacation May 29-June 6
>
> Hugh- this is not how you treat an employer of yours that works very hard for you and Knox county. It's unacceptable behavior.
>
> Sent from my iPhone
> Janice Orr
>
> On Apr 16, 2015, at 10:12 AM, Hugh Holt <Hugh.Holt@knoxcounty.org> wrote:

Your the technology buyer. You should already have the laptop. So again you have not delivered on your goals. All that failure must be wearing on you. May be that's why you called in [redacted] 2 days this week.

Sent from my U.S. Cellular® Smartphone

-------- Original message --------
From: Janice Orr <Janice.Orr@knoxcounty.org>
Date: 04/16/2015 9:42 AM (GMT-05:00)
To: Hugh Holt <Hugh.Holt@knoxcounty.org>
Subject: FW: Vacation May 29-June 6

Next year I will be sure to have it completed by that date. I am waiting on my laptop to begin training this year. Laptop should be here in the next two weeks.

Thanks
Janice Orr

From: Hugh Holt
Sent: Monday, April 13, 2015 8:04 AM
To: Matt Myers; Janice Orr
Subject: RE: Vacation May 29-June 6

Yes

Sent from my U.S. Cellular® Smartphone

-------- Original message --------
From: Matt Myers <Matt.Myers@knoxcounty.org>
Date:04/10/2015 2:25 PM (GMT-05:00)
To: Janice Orr <Janice.Orr@knoxcounty.org>
Cc: Hugh Holt <Hugh.Holt@knoxcounty.org>
Subject: RE: Vacation May 29-June 6

Credit Card training has to be ***completed*** by June 30, 2015 (and every year after). You agree Hugh?

Matt

From: Janice Orr
Sent: Friday, April 10, 2015 2:18 PM
To: Matt Myers
Subject: RE: Vacation May 29-June 6

Seriously

From: Matt Myers
Sent: Friday, April 10, 2015 2:17 PM
To: Janice Orr
Subject: RE: Vacation May 29-June 6

Only if Credit Card Training is complete.

Matt Myers
KCP

From: Janice Orr
Sent: Friday, April 10, 2015 2:12 PM
To: Matt Myers
Subject: Vacation May 29-June 6

Matt – I would like to take May 29th – June 6th for vacation.

Thank you,
Janice Orr

Janice Orr
Program Manager/Buyer
Knox County Purchasing Division
1000 N. Central Street, Suite 100.
Knoxville, TN 37917
865-215-5769 O
865-388-4906 C

Glenda Irwin

From: Janice Orr
Sent: Wednesday, May 06, 2015 3:30 PM
To: Glenda Irwin
Subject: Place in file
Attachments: Position Reclassification.pdf

Glenda – Please put in my personnel folder.
Thank you,
Janice Orr

Janice Orr
[redacted]

Position Reclassification/New Position Classification Recommendations

Department	Purchasing
Name and Title of Individual Making Request	Hugh Holt, Director of Purchasing, Property Management, Mailroom Services and Maintenance
Proposed Position Title	Program Manager/Contract Specialist
Existing Position Title	Program Manager/Contract Specialist
Position Number	[redacted]
Position Status	Reclassification
Analysis and Findings	The Knox County Government compensation consultant participated in a meeting with the Knox County Government Director of Purchasing, Property Management, Mailroom Services and Maintenance and participated in follow-up telephone conversations in order to analyze the position of Program Manager/Contract Specialist and learn of the scope, duties, and responsibilities of the position to determine whether a reclassification would be in order. In addition, the compensation consultant reviewed a recently completed position description form (PDF) that was filled out by the department Director to gain an understanding of the proposed position's level knowledge, skills, abilities, education, and experience necessary for successful job performance. The compensation consultant learned that the position was evaluated and reconstituted in July 2014 and the evaluation resulted in a two-step pay increase. However, the current reclassification request is a result of recent experience demonstrating increased scope and responsibilities as well as recent realignments of a number of positions resulting in reassignment of responsibilities in the department. Major responsibilities of the position include performing strategic and analytical tasks resulting in the creation of reports and spreadsheets needed for auditing and program benchmarking; performing professional and administrative duties in the process of acquiring goods and services for Knox County Government such as developing bidding instruments, evaluating and analyzing submittals to solicitations, composing and negotiating subsequent contracts, creating and expediting purchase orders, and reviewing vendor performance; conducting pre-solicitation meetings and notifying potential vendors and other interested parties of those meetings; formulating standard contract terms and conditions; interacting with consultants, contractors, vendors and County Government departments on document preparation, policies and procedures; reviewing

Analysis and Findings (cont.)	insurance, bid bonds, performance and payment bonds to ensure and verify financial viability and solvency of insurers and sureties; seeking out and recommending consolidation of needs to realize savings through quality buying and researching cooperative purchasing alliances; and employee supervision. The Program Manager/Contract Specialist manages day-to-day operation of the Knox County Government card program; evaluate invoice information to identify discrepancies and needs for corrective action and suggest and implement appropriate measures to resolve discrepancies; performs professional administrative duties in the process of acquiring goods and services; supervise the Card Program Coordinator; manage the bank relationship by working closely with the issuing bank and network to continually improve the card program; training all cardholders; conduct random compliance checks of card transactions to ensure cardholder compliance with program policies and procedures; and prepares and manages the Knox County Government budget for the card program.
Recommendations	The Compensation Consultant found that the scope and depth of job responsibilities for the position of Program Manager/Contract Specialist warrants a recommendation for a one grade increase from Grade 22 to Grade 23. The position's annual compensation is based on a 2,080 work-year and, should the recommendation be accepted, would result in a pay range minimum pay rate of $51,177.15 and a maximum of $85,392.94. It is anticipated that Knox County Government will implement the new pay scale at the outset of the new fiscal year beginning in July 2015. Should the new scale, in fact, be instituted, this will result in different minimum and maximum pay range rates. An updated position description will be drafted for review and approval of the Purchasing Director and Knox County Government Human Resources staff.
Additional Information	N/A. The position number will remain the same.
Consultant Contact Information	Following is information for the consultant responsible for analysis of the position: Dr. L. O. (Lou) Rabinowitz PO Box 6065 Oak Ridge, TN 37831 Phone: (865) 805-0632 Email: lou@lorconsultancy.com

RECEIVED JUL 21 2015

Glenda Irwin

#[redacted]

From: Janice Orr
Sent: Tuesday, July 21, 2015 9:40 AM
To: Glenda Irwin
Subject: FW: Janice Orr [redacted] Leave Request
Attachments: Janice Orr [redacted] Leave Request with Signatures.pdf

Glenda – I just sent this over to Pat. Could you put this in my personnel folder.

Thank you,
Janice Orr

From: Janice Orr
Sent: Tuesday, July 21, 2015 9:39 AM
To: Pat Carson
Subject: Janice Orr [redacted]

Pat – Please find attached Leave of Absence Notification Form. Call me at 865-[redacted] if you have any questions.

My [redacted] date is August 18th. I will need the [redacted] form.

Thank you,
Janice Orr

Knox County Government
Leave Of Absence Notification Form

Employee # [redacted]

EMPLOYEE SECTION

Redacted

[redacted]

MEDIA RELEASE

Janice Orr

[redacted]

OFFICE OF COUNTY MAYOR TIM BURCHETT

400 Main Street, Suite 615, Knoxville, TN 37902

FOR IMMEDIATE RELEASE

Contact: Michael Grider
865-215-4750 office
865-363-8681 cell

Jennifer Linginfelter
865-215-4579 office
865-803-5509 cell

January 27, 2014

SunTrust presents Knox County with rebate check

KNOXVILLE, Tenn. (Jan. 27, 2014) – This morning, SunTrust Bank presented Knox County Mayor Tim Burchett with a $446,343 E-commerce card rebate check.

Knox County earned the nearly half-million-dollar rebate from the use of its E-commerce cards during the 2013 calendar year. This amount surpassed 2012's rebate by more than $128,000, a 40 percent increase.

"I appreciate the work of Knox County Purchasing Program Manager Janice Orr and the rest of the purchasing department for their help in ensuring such substantial savings for Knox County's taxpayers," said Knox County Mayor Tim Burchett. "The E-commerce card rebate program shows there is a real-dollar value to efficiency in government."

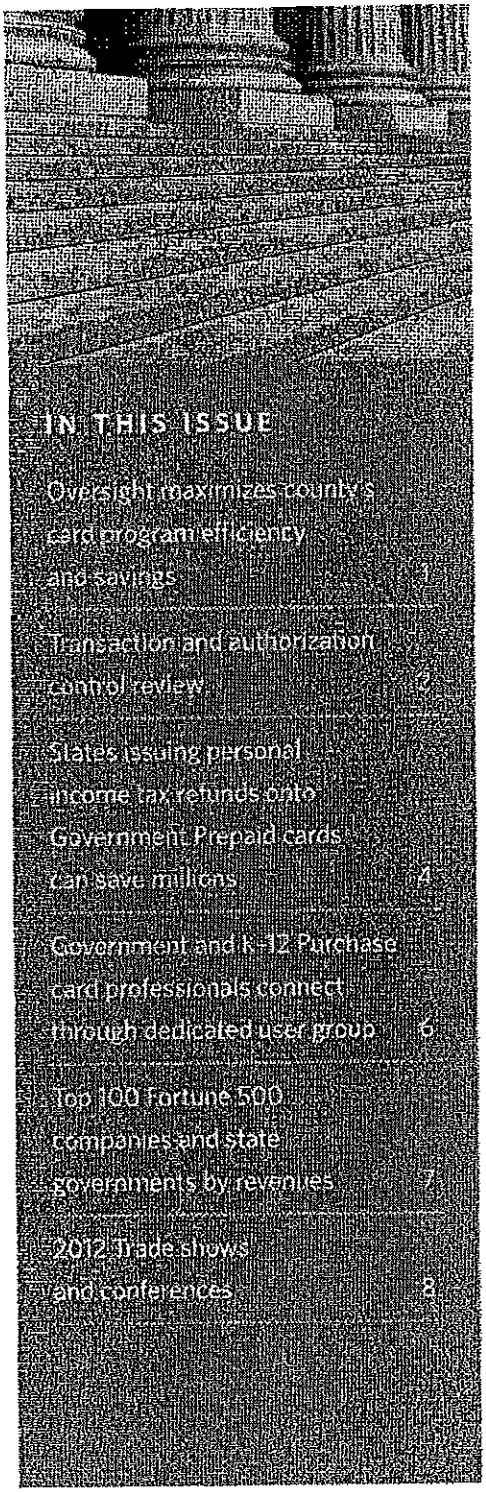
One unique impact on the 2013 rebate was smart construction planning with Carter Elementary School. Since the construction of Carter Elementary was managed by Knox County staff, and thanks to a partnership with Knox County Schools, technology purchases were put on the card resulting in an additional $100,000 in rebates.

Over the past three years, Knox County has received more than one million dollars in rebates. The Knox County Purchasing Department identifies opportunities to utilize the cards for various county transactions with third party vendors, and has saved Knox County millions through cost-avoidance by consolidating the E-commerce card program.

###

SUNTRUST
DATE January 27, 2014
PAY TO THE ORDER OF Knox County Tennessee
$ 446,343.00
DOLLARS

VISA GOVERNMENT SOLUTIONS
THE VISA EXCHANGE: STATE AND LOCAL
FALL 2012



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Stay informed with the latest news for the public sector

Oversight maximizes county's card program efficiency and savings

For state and local government, it's not enough to be good stewards of the budget. Today, governments are required to spend more wisely while cutting costs and improving the functionality of the procurement process. For Knox County, Tenn., key to achieving those goals is fast, accurate procurement spending data.

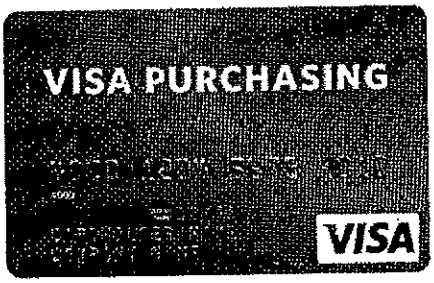
Operating under the Knox County Procurement Code, the purchasing division is responsible for supply management, maintaining centralized procurement and supervising all services purchased and/or leased for the county. The county's Visa Purchase card program, established in 2001, today includes more than 170 cardholders who spend $16 million annually. Keeping an eye on that purchasing activity is critical.

"We want to make sure all our cardholders are maximizing use of the card, but using it appropriately," says Janice Orr, procurement card administrator for Knox County. "We also want to make sure our taxpayers are able to clearly see that we are making responsible purchases." To accommodate these goals, Orr makes maximum use of the program's spend data application provided by their issuer, in order to track every transaction made with the purchase cards. That data has made it easier to encourage cardholder compliance. "It keeps our card program aligned with our policies with an electronic transaction audit trail so we can monitor card use and detect any fraud and misuse," says Orr.

continued on page 3 ...

Transaction and authorization control review

Well-conceived transaction and authorization controls are a critical component of a healthy purchasing card program. These controls help reduce exposure to risk because they enhance control and accountability and ensure cardholder compliance with your purchasing policies.



Following are examples of typical transaction and authorization controls:

Merchant Category Code (MCC)
Merchants are assigned a category code, referred to as an MCC, based on the type(s) of goods and services they provide. MCCs can be "blocked," which restricts the cardholder from making a purchase at any merchant with a blocked MCC. Examples of MCCs that you may elect to block include jewelry, department and grocery stores, and dating and escort services.

Care must be taken so that legitimate government suppliers are not blocked. Current suppliers should be analyzed to find the MCCs in which they are categorized so that those MCCs remain unblocked. Some organizations maintain MCC watch lists, which show transactions occurring at merchants within specific MCCs that the organizations are considering blocking. This can be a good intermediate step while it is determined whether there is a valid business reason for keeping the MCCs unblocked.

Cash Back/ATM Restriction
This restriction denies cardholders the ability to get cash back during a transaction or to withdraw cash from an ATM.

Single Transaction Limit
This limits the dollar amount a cardholder can spend on a single transaction.

Billing Cycle Spend Limit
This limits the total dollar amount a cardholder can spend during a billing cycle.

Transaction Frequency Limit
This control limits the number of transactions a cardholder can make during a set period of time (24 hours, seven days, or a billing cycle).

Oversight maximizes county's card program efficiency and savings

continued from page 1 ...

With an increase in card use – spending has increased by $6.3 million during Orr's two-plus year tenure – automated data reconciliation has become particularly important. The county's purchase card data is consolidated and receipts are reconciled in coordination with their enterprise resource planning system. This functionality delivers tailored reporting to management, which, in turn, helps the county better negotiate vendor contracts.

"It's key to utilize your financial management system in conjunction with your Visa Purchase card program," Orr says. "For example, we use the spending data from the customized reports for strategic sourcing to negotiate supplier and volume discounts."

In addition to monitoring spending behavior through a strong compliance and reporting management tool, Orr also believes that an efficient, accountable and transparent Visa Purchase card program is achieved through keen oversight. The county's program makes sure cardholders are trained in person, where those responsible for making purchases on behalf of the county receive clear instruction on responsibilities of appropriate spending. Those in-person sessions also provide the card program with insight from the end users, which helps her fine-tune the program.

"We will continue to grow our purchase card program by maximizing spend opportunities and streamlining our communication and training while maintaining control," says Orr.

For more information on Visa Government Purchase cards for your state, contact Darren Muise at dmuise@visa.com

About the Knox County card program:

Number of cards:

173

Monthly spend:

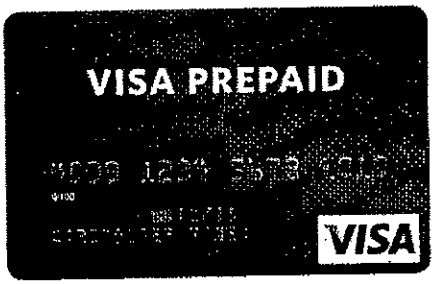
$1.6 million

Year program was established:

2001

Numbers are current as of July 2012.

States issuing personal income tax refunds onto Government Prepaid cards can save millions



Issuing personal income tax refunds via Government Prepaid cards is one of the latest trends in government disbursement programs. Six states – Louisiana, South Carolina, Georgia, Oklahoma, Connecticut and New York – have already launched prepaid Personal Income Tax (PIT) disbursement programs, and Alabama and Missouri are planning program launches at the beginning of the January 2013 tax season.

"We expect to see more and more requests for tax refund-related prepaid card programs as states take notice of this trend," says Brian Triplett, global head of Visa's North American prepaid products.

A Visa® Prepaid Government Disbursement card program provides state agencies an efficient way of distributing government benefits, assistance payments or any government-to-constituent payments. Most of the costs associated with checks, including printing, mailing, postage and lost/stolen handling, can be eliminated.[1]

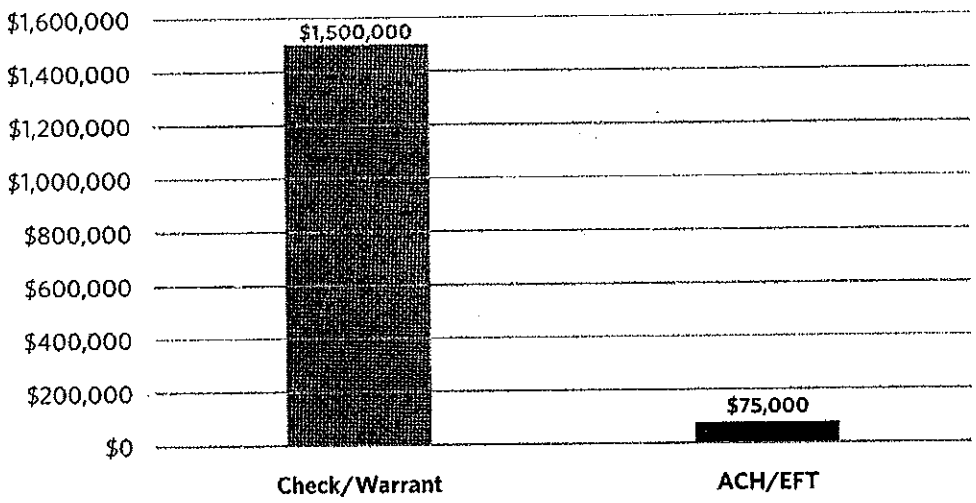
Visa Prepaid Government Disbursement card programs can also help government agencies meet compliance requirements with electronic payment statutes, and support sustainability and resource conservation efforts. In addition, by shifting resources from check-related administration and processes to efficient electronic payments, government personnel can focus on the core mission of the agency.

Taxpayers can also benefit from prepaid disbursement card programs by receiving their refunds electronically even if they don't have a bank account. Funds could arrive faster than by check and cardholders avoid the inconvenience of cashing a check and save any related check-cashing fees.

"Taxpayers who receive their refunds this way have instant access to their money," Triplett says. "The cards work everywhere Visa Debit cards are accepted at millions of merchants and businesses in-store, online and by phone and at more than 1 million ATMs worldwide."

Cardholders can feel more secure as they do not need to carry large amounts of cash, and Visa Prepaid Government Disbursement cards are covered by the Visa Zero Liability policy, protecting cardholders from the liability of loss or fraudulent charges.[2]

While many individuals receive their PIT refunds by direct deposit, states that add a Visa Government Prepaid program could eliminate the remaining PIT refund checks issued each year and potentially save millions over time. The chart below is a representative sample of the comparative costs to a state agency that provides 1.5MM PIT refunds via checks/warrants each year versus electronic payments.[3]



"Efficiencies and cost savings are driving the interest of more states to adopt Visa Government Prepaid cards for personal income tax refund disbursement," Triplett says.

For more information on Visa Government Prepaid cards for your state, go online to http://usa.visa.com/government/payment/government-prepaid.html.

Benefits of tax refunds via Government Prepaid cards:

- Efficient distribution
- Cost savings over paper check issuance
- Compliance with electronic payment statutes
- Recipients get instant access to their funds

[1] Calculations are illustrative and actual cost savings may vary by implementation and depending on business details.

[2] The Visa Zero Liability policy covers U.S.-issued cards only and does not apply to ATM transactions, PIN transactions not processed by Visa, or certain commercial card transactions. Cardholder must notify issuer promptly of any unauthorized use. Consult issuer for additional details or visit www.visa.com/security.

[3] This is an illustrative calculation using the following assumptions: average industry cost savings data of approximately $1 for every check or warrant eliminated from the current system and $0.05 per electronic payment via ACH/EFT. Actual cost savings may vary by implementation and depending on business details.

The information presented here is for use in support of Visa products and programs.

Government and K-12 Purchase card professionals connect through dedicated user group

Commercial card professionals in government and school districts now have an easier way to share practices and gain insight from each other.

The Government/K-12 Education User Group sponsored by the National Association of Purchasing Card Professionals (NAPCP) delivers online networking convenience for users to discuss topics, share resources and expertise, expand their professional network, plan outreach efforts, gain fresh insight, get tips and broaden their knowledge. Members gain exclusive access to an online resource center and member directory, making experts and advisors just one click away. They can follow sector-specific eNetworking blogs and read educational content specific to the interests of the group as well as group calendars and events.

Thirty-seven members currently participate in the Government/K-12 User Group, which is guided by a 10-member advisory group that holds monthly conference calls. The membership participated with a strong presence at the NAPCP 2012 Annual Conference to spread the word about their efforts. They facilitated a Hot Topic Discussion session and hosted an exhibit table. Current members and conference attendees report they love having access to what is going on within the private sector and, in particular, the dedicated website and events that are specific to their needs.

"The NAPCP's online user group communities represent a great opportunity to meet members with the same interests," says Terri Brustad, CPCP, Program Administrator for the City of Arvada, Colo., and group Advisory Board member. "We have reached out to each other to discuss transparency requirements, consortium agreements, and audit processes. Because we are all public sector entities, all aspects of our day-to-day business are public and can be shared - something that makes us unique. A significant benefit I have received is the opportunity to partner directly with a representative from one of the networks and receive direct support for my program."

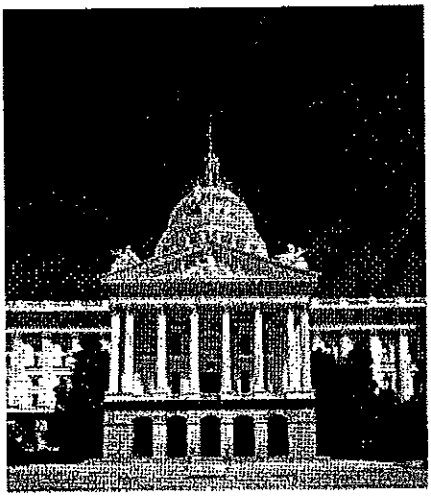
To join the Government/K-12 Education User Group, you must be a member of the NAPCP.

To learn more, go to **www.napcp.org/UserGroups**

Top 100 Fortune 500 companies and state governments by revenues[++]

State governments rival corporate players in revenue and play an important role in cultivating regional economies.

Ranking	Company or State	Revenues ($ millions)
1st	Exxon Mobil	452,926
2nd	Wal-Mart Stores	446,950
3rd	Chevron	245,621
5th	State of California	201,070
6th	General Motors	150,276
7th	General Electric	147,616
8th	State of New York	147,340
9th	Berkshire Hathaway	143,688
15th	State of Texas	119,095
16th	Bank of America Corp.	115,074
37th	Commonwealth of Pennsylvania	71,142
38th	MetLife	70,641
44th	State of Florida	68,621
45th	Pfizer	67,932
47th	State of Ohio	65,615
48th	Johnson & Johnson	65,030
54th	State of Illinois	58,524
56th	Comcast	55,842
57th	State of New Jersey	55,046
58th	Kraft Foods	54,365
61st	Commonwealth of Massachusetts	51,760
62nd	State of North Carolina	51,421
63rd	Best Buy	50,272
75th	State of Michigan	42,259
76th	Sears Holdings	41,567
77th	State of Georgia	41,164
78th	Walt Disney	40,893
92nd	Goldman Sachs Group	36,793
93rd	State of Washington	36,660
95th	Commonwealth of Virginia	36,232
96th	Oracle	35,622
100th	New York Life Insurance	34,393.5



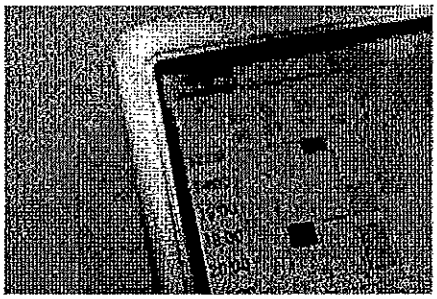
Sacramento capital building

[++]Company revenue data from Fortune 500 2012 ranking of America's largest companies, http://money.cnn.com/magazines/fortune/fortune500/2012/full_list/.

State revenue data from U.S. Census Bureau, Federal, State, and Local Governments, Finance, Survey of State Government Finances, 2008, http://www.census.gov/compendia/statab/2012/tables/12s0452.pdf.

MARK YOUR CALENDAR

2012 Trade shows and conferences



October

Association for Financial Professionals
Annual Conference
October 14–17, Miami Beach, FL
www.afponline.org/pub/conf

National Association of State Chief Information Officers
Annual Conference
October 21–24, San Diego, CA
www.nascio.org/events

November/December

National Association of Regulatory Utility Commissioners
Annual Meeting
November 11–14, Baltimore, MD
annual.narucmeetings.org

National League of Cities
2012 Congress of Cities
November 28 – December 1, Boston, MA
www.nlc.org/events/coc

The Council of State Governments
National Conference
November 30 – December 3, Austin, TX
www.csg.org/2012NationalConference

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Betty Penson [redacted]

From: Janice Orr
Sent: Friday, October 05, 2012 9:14 AM
To: Richard Julian; Pat Carson; Betty Penson
Subject: FW: Fall 2012 Visa Exchange for State and Local governments.

Will you please put this in my personnel file.

From: jeff.dobbs@regions.com [mailto:jeff.dobbs@regions.com]
Sent: Friday, October 05, 2012 8:38 AM
To: Janice Orr
Subject: Fw: Fall 2012 Visa Exchange for State and Local governments.

Jeff S. Dobbs
Vice President
Treasury Management Officer
151 Major Reynolds Place
Knoxville, TN 37919
W (865) 540-5416
[redacted]
Fax (865)521-5352
[redacted]
jeff.dobbs@regions.com

****
IMPORTANT CUSTOMER NOTICE REGARDING PHISHING SCAMS

Regions Bank will never contact clients by e-mail to ask for account numbers, PINS, or any personal information. Regions has numerous systems in place to protect our clients' privacy and security and will not need to ask for this information. We will never make you renew or reactivate a service that we haven't previously communicated to you will be expiring.
****

Finac Purch

Knox County Government

RECEIVED AUG 2 4 2009

Employee Requisition

(Provided by HR) Employee # _____

Requisition # 714

Date Posted 8-24-09

Process Level Finac

Department Purchasing

Accounting Unit # 1006010

Activity Number Purchasing

Job Code 1640-001

Job Title ~~Procurement~~ Specialist

Starting Salary 24,435.57

Schedule _____ Pay Grade 11 Step 2

REPLACEMENT

Is this a replacement? ☒ Yes ☐ No (If yes, provide information below)

Name of person being replaced Leslie Collier

Employee # [redacted]

Soc. Sec. # of person being replaced [redacted]

Date of Transfer / Termination 8/24/09

HUMAN RESOURCES REQUEST

I would like H.R. Assistance in: Conducting interviews ☐

Post: ☐ 1 Week ☒ 2 Weeks ☐ Other _____ Newspaper Advertisement Yes ☒ No ☐

I understand that this position will be posted at the minimum requirements stated on the current job description.

_____

Supervisor's Signature

POSITION STATUS: (check one)

Base Annual Hours ~~1950~~ 2080 Pay Method: ☐ Hourly ☒ Salary *(Sheriff's Dept. Only)* Shift _____

☒ Full-time 80 hours per pay period

enroll ☒ Full-time 75 hours per pay period

☐ Part-time _____ hours per pay period

☐ Temporary _____ hours per pay period

SIGNATURES

1) Supervisor — 8/20/09 — Date

2) Department Manager/Director — 8-21-09 — Date

3) Senior Director — 8-21-09 — Date

4) Compensation Manager — 8-21-09 — Date

5) Human Resources Director — 8-21-09 — Date

6) Budget Approval — Date

7) Senior Director of Finance — 8-21-09 — Date

8) County Mayor *(If New Position)* — Date

9) Payroll Department — Date

KNOX COUNTY GOVERNMENT

POSITION OPEN

PURCHASING SPECIALIST
Purchasing Department

1640-001

PURPOSE OF CLASSIFICATION: The purpose of this classification is to perform professional and administrative duties in the processing of purchase requisitions. Duties include, but are not limited to: processing incoming purchase requisitions, generating and issuing purchase orders, developing and evaluating bids and proposals; entering and extracting data from several different databases; administration of the vendor database; communicating with vendors and County employees on a frequent basis; providing clerical support for the department, and performing other duties as assigned by the Contracts Administrator/Purchasing Agent.

ESSENTIAL FUNCTIONS: The following duties are normal for this position. These are not to be construed as exclusive or all-inclusive. Other duties may be required and assigned. Processes purchase requisitions and ensures compliance with all applicable laws, rules, regulations, standards, policies and procedures; initiates any actions necessary to correct deviations. Performs data entry functions by keying data into computer system; enters, retrieves, reviews or modifies data in computer database; verifies accuracy of entered data and makes corrections. Enters vendor commodity codes into computer system to ensure notification of bid process. Provides clerical support for the department; assists other clerical personnel with questions/problems.
Solicitation development and evaluation; ensures compliance with all applicable laws, rules, regulations, standards, policies and procedures; initiates any actions necessary to correct deviations. Administers vendor database. Performs market research and/or product research as needed. Attends community meetings with Supplier Diversity Coordinator and interacts with general public and officials. Processes payroll documents and check requests forms on an as needed basis. Prepares weekly newspaper advertisements for current solicitations on an as needed basis. Processes via E-Commerce purchase requisitions with awarded vendors. Maintains E-Commerce database with current vendors. Assigns logins and passwords with E-Commerce programs. Conducts user meetings with internal users of the E-Commerce programs. Conducts trainings classes on websites of E-Commerce vendors. Attends pre-solicitation meetings and records findings.

ADDITIONAL JOB FUNCTIONS: Responds to and reports immediately if called upon by local regional or central office supervisors, as part of a coordinated emergency response by the Knox County Department of Health. Performs other related duties as required.

MINIMUM TRAINING AND QUALIFICATIONS: High school diploma or GED; supplemented by college level course work or vocational training in purchasing and personal computer operations; supplemented by (1) one to (3) three years previous experience and/or training involving purchasing, clerical/office work, data entry, and personal computer operations; or any equivalent combination of education, training, and experience which provides the requisite knowledge, skills, and abilities for this job. Must have and maintain a Master Certificate in Government Contract Management. Must be proficient in Microsoft Office.

PHYSICAL REQUIREMENTS: Must be physically able to operate a variety of office machines and equipment such as personal computers, printers, telephones, calculators, photocopiers, and fax machines. Must be able to use body members to work, move or carry objects or materials. Physical demand requirements are at levels of those for sedentary work.

SALARY: $24,435.57 annually
DEADLINE: Applications must be received in the office by September 9, 2009 (4:30 p.m.)

If you need reasonable accommodations to complete an application or for an interview, please contact the Department of Human Resources. Some accommodations take several days to arrange. Please notify us early to make the arrangements. **Non-discrimination:** Knox County prohibits discrimination in employment on the basis of race, color, sex, age, religion, national origin, and disability status.

APPLY TO:

Knox County Human Resources, Room 360, City/County Building, 400 Main Street, Knoxville, TN 37902. Knox County is an Equal Opportunity Employer.

Please Print Or Type

Knox County Government

APPLICATION FOR EMPLOYMENT

Room 360 City-County Building, 400 Main Street
Knoxville, TN 37902-2405

ENTERED AUG 27 2009

#[redacted]

Applicants are considered for all positions without discrimination on the basis of race, sex, color, religion, national origin, age, disability or veteran status in employment opportunities or benefits.

ORR | Janice | Ann | 8/27/09
Last Name | First | Middle | Date

[redacted]
Street Address | City | State | Zip

REQ 716

[redacted] | [redacted] | Business Phone
Social Security Number | Home Phone

Title and Number of Position(s) Desired: (1) Purchasing Agent

Expected Salary $ 25,000

Date you would be available to start work? _____

State age if under 18: _____

Are you legally eligible for employment in the U.S.? Yes ☑ No ☐

Proof of citizenship or immigration status will be required upon employment.

The information requested below is needed for legally permissible reasons, including but not limited to a legitimate occupational qualification or business necessity.

Have you been convicted of, or plead guilty to, a crime in the past ten years which has not been annulled, expunged, or sealed by court?

Yes ☐ No ☑ If yes, describe in full _____

School Attended	Address	Course/Degree	Grade Completed	
William Blount High School		general	9☐ 10☐ 11☐ 12☑ ☐GED ☐Diploma	
			Did You Graduate?	
Technical School			Yes ☐	No ☐
Tuscolum College College #1		Organizational Mgmt	Yes ☑	No ☐
			Yes ☐	No ☐
College #2				
			Yes ☐	No ☐
Graduate School				
			Yes ☐	No ☐
Graduate School				

WORK REFERENCES

Name/Occupation	Address	Phone Number
Wyndle Kingsmore		[redacted]
Phyllis Moyers		[redacted]
Jenny HoHo		[redacted]

For an accommodation to complete this application or participate in an interview, please call 215-2321 (TTY 215-2497). Accommodations require 48 hours notice.

R606

RECEIVED AUG 27 2009

Begin with your most recent employer and provide the information requested. If more space is needed, you may attach additional sheets.

Jewelry Television — 865 - [redacted] - [redacted]
Company Name — Phone

10001 Kingston Pike — Knoxville — TN — 37922
Address — City — State — Zip Code

Administrator of H.R. — Donna Burns
Job Title — Name of Supervisor

Job Duties: See resume

Employment Dates (Mo. /Yr.) From 08/07 To 01/09 — Annual Salary: Start $_____ End $ 48,000

Reason for Leaving: Laid off — May we contact this employer? ☑ Yes ☐ No

---

Axis Fabrication & Machine Co — 865 - [redacted] - [redacted]
Company Name — Phone

2107 Frank Bird Blvd — Rockford — TN — 37853
Address — City — State — Zip Code

Office Mgr. — James Lewis
Job Title — Name of Supervisor

Job Duties: See resume

Employment Dates (Mo. /Yr.) From 09/05 To 7/07 — Annual Salary: Start $_____ End $ 45,000

Reason for Leaving: _____ — May we contact this employer? ☑ Yes ☐ No

---

Prof Pitts Corporate Office (Bulk) — 704 - [redacted] - [redacted]
Company Name — Phone

Address — City — State — Zip Code

See resume — Phyllis Moyes
Job Title — Name of Supervisor

Job Duties: See resume

Employment Dates (Mo. /Yr.) From 1994 To 2005 — Annual Salary: Start $_____ End $ 42,000

Reason for Leaving: Company Buyout; Laid off — May we contact this employer? ☑ Yes ☐ No

Read and sign: These answers are true and complete to the best of my knowledge. I understand that any false or misleading information provided during the application or interview process will result in the withdrawal from consideration from employment or my immediate discharge if I am hired, regardless of when discovered. I authorize Knox County to make a through investigation of all statements contained in this application, my past employment, education, and job related activities, and I release from liability all persons, companies and corporations supplying this information.

Signature of Applicant: Janice Ann Qu — Date: 8/27/09

This application cannot be processed without a signature.

Janice Gentry-Orr

[redacted]

[redacted]

Summary

Background includes experience in all aspects of executive administrative support and operations management in both corporate and customer-oriented environments. Experienced in supporting associates, customers, executives, and working as an integral team member on numerous special projects. Proficient in Microsoft Office, QuickBooks and Oracle systems. Offer the intelligence to quickly learn and adapt to new business environments, policies, procedures, and computer programs/systems.

Professional Experience

Jewelry Television
10001 Kingston Pike
Knoxville, TN 37922

865[redacted]

Administrator Manager of Human Resources Aug 2007 – Jan 2009

- Supported 1700 employees and provided realistic solutions for the employees. Quickly gained respect and promoted high standards for honesty, integrity and fairness.
- Handled all relocation for new hires. Developed relationships with vendors to receive discounts for the company, averaged 5 relocations a month.
- Created and tracked management offer letters, employment agreements and reimbursement agreements for new hires / internal promotions.
- Provided the knowledge of excellent employment file keeping. Transformed a more proficient filing system.
- Re-evaluated all administrative procedures for the Human Resources department
- Implemented cost savings strategies for office supplies for total company. Created HR budget and effectively managed the departmental budget.
- Supported the Vice President of Human Resources.
- Key person and organizer of restructuring /reorganization of company for 2008.
- Accounts Payable for the Human Resources and Training department.

Axis Fabrication and Machine Company
2107 Frank Bird Blvd.
Rockford, TN 37853

865.[redacted]

Office Manager Sept 2005 – July 2007

- Strategically focused on Employee Relations, Benefits, Payroll, Workman's Compensation and Drug Free Workplace processes.
- Resolved conflict through a complete understanding of different positions, encouraged and valued alternative options and identified common ground to which all parties viewed as a successful resolution.
- Group Administrator for Blue Cross/Blue Shield, health, life and voluntary benefits insurance. Included financial decision making on negotiations selecting benefit package that was best suited for company and employee. Prepared and conducted yearly open enrollment meetings. Communication liaison between BC/BS and employee.
- Supervised Accounting Manager, Accounts Receivable clerk and general affairs.
- Improved the payroll system to create a more accurate process. Successfully met government guidelines, also worked closely with company accountant to receive maximum financial planning.
- Increased participation of John Hancock 401(k) plan. Conducted open enrollment meetings, administrated monthly employee and employer payroll deferments.
- Implemented "Tennessee Drug Free Workplace" Maintained program according to the OSHA and Tennessee laws.
- Managed worker's compensations accidents, claims, updated all OSHA regulated forms and communication to the employees.
- Quickly showed strong leadership in small manufacturing company by working with a group, being a team member, coordinating the work of others and being responsible for the project results.

Proffitt's/McRae's Corporate Office 1994-2005
Alcoa, TN 37701

Account Executive in Sales Promotion, 2004-2005

- Tracked all direct mail, inserts and special projects throughout department and maintained adherence to production schedule.
- Worked with designers, copywriters and creative director to expedite flow of work to meet production schedule.
- Monitored all advertising projects to ensure each stage of production schedule was adhered to.
- Administrated, maintained and assisted with the development of systems to improve and enhance workflow with designers and copywriters.
- Coordinated creation of JPEG and PDF files for uploading the internet, and coordinated e-mail notices to merchants.

Administrative Assistant to the Director of Human Resources, 1998-2004

- Earned a reputation for ability to handle detailed, complex assignments, and was selected for many special projects involving highly sensitive H.R. relation information.
- Clarified, directed and pursued benefit issues in a timely manner to gain successful resolution for 53 stores and 275 corporate associates.
- Built strong associate relations to become of the key contact advocates in the office.
- Assisted in yearly open enrollments process to meet 100% compliance within the company guidelines.
- Coordinated the Executive Training Program interviewing, hiring, and graduation ceremony processes.
- Successfully assisted with coordinating/managing a major project (during the company's aggressive acquisition phase) that consolidated the Proffitt's/McRae's corporate offices into the Knoxville location.
- Completed administrative duties that included preparing monthly H.R. reports, handling special reports, tracking employee career growth, invoicing, and coordinating interviews and travel itineraries.
- Conducted reference checks and credit checks for salary/hourly associates.
- Managed weekly updates for personnel as well as updates on organizational charts for both corporate office and all retail stores.

Administrative Assistant to the Director of Training, 1995-1997

- Managed special projects for the Director of Training including the rollout of an automated in-store interview training system to over 200 stores.
- Performed administrative duties including ordering office supplies, serving as liaison between all divisions to coordinate information and obtain project and training materials, scheduled travel for trainers, and organized corporate meetings.

Personnel Records Assistant, 1995-1995

- Promoted into this short term position to maintain all personnel records for corporate employees as well as all management and hourly at 27 Proffitt's stores.
- Assisted with coordinating special H.R. corporate events and provided payroll assistance.

Sally Huss Gallery
Destin, FL 1997-1998

Gallery Manager

- Increased sales and profitability of this art gallery franchise by implementing retain management strategies in the areas of customer service enhancement, inventory control, merchandising and sales planning/forecasting.
- Implemented the opening of new store in Foley, AL to open the franchise of its second store.
- Trained new employees to work together to exceed individual and team goals by focusing on customer service as the #1 priority.
- Managed payroll, ordering supplies, stock, and buying from outside vendors.

Education

Bachelors of Science in Organization Management, Tusculum College, Greeneville, TN 37745

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Finance Purch

Knox County Government

New Hire/Rehire

Requisition # 7116 (Provided by HR) Employee # [redacted]

SUPERVISOR USE ONLY

Date of Hire/Rehire *(actual date employee begins work)* 9/29/09

Prior Knox County Employment: ☒ No ☐ Yes (If yes) provide dates _____

(If yes) identify agency ☐ Knox County ☐ Knox County Schools ☐ Fee Offices/Elected Officials

Last Name	First	Middle Initial
ORR	JANICE	A.

Street Address	Apartment No.	City	State	Zip
[redacted]	[redacted]	[redacted]		

Date of Birth	Phone Number	Social Security Number
[redacted]	[redacted]	[redacted]

Annual Hours *(Scheduled)* ~~☒ 1950~~ ☒ 2080 ☐ Other _____ per M. Reeves 10/1/09

☐ Salary Annual Salary $ 24,435.57 ☐ Hourly Hourly Rate $ _____

Pay Grade 11 Step 2

Process Level	Dept. Code	(Sheriff's Dept. Only) Shift
FINANCE	100610	

Job Code / Position	Job Title	Union Code	(Grants Only) Activity #
1140-001	PURCHASING SPECIALIST	PROB	

☐ A1 (Full-time 30hrs. & over) ☐ A2 (Part-time 18.5 to 29 hrs.) ☐ A3 (Part-time under 18.5 hrs.)

☐ A4 (Seasonal, Temp, Interns) ☐ (Other) _____

Source of Funding IN CURRENT BUDGET (REPLACED LESLIE COLLIER)

HUMAN RESOURCES USE ONLY

FTE _____ EE04 Functional Group _____ Base Annual Hours _____

PAYROLL USE ONLY

☐ Exempt ☐ Non Exempt

Pay Plan _____ Automatic Time Record ☐ Yes ☐ No

Automatic Deposit ☐ Yes ☐ No Expense Account _____

APPROVALS

1) Supervisor	Date 9/29/09	6) Senior Director of Finance	Date
2) Department Manager/Director	Date 9/29/09	7) County Mayor *(If New Position)*	Date
3) ~~Senior Director~~ Finance	Date	8) Payroll Department	Date
4) Compensation	Date 9-30-09	9) Payroll Department	Date
5) Human Resources Director	Date 9/30/09		

Knox County Government

Employee Information

(Provided by HR) Employee # _____

PREVIOUS EMPLOYMENT

Prior Knox County Employment: ☑ No ☐ Yes *(If yes)* provide dates _____

(If yes) identify agency ☑ Knox County ☐ Knox County Schools ☐ Fee Offices/Elected Officials

EMPLOYMENT INFORMATION

Date of Hire *(actual date you begin work)* 9/29/2009

[redacted]
Date of Birth

[redacted]
Social Security Number

ORR | Janice | a
Last Name | First | Middle Initial

[redacted]
Street Address | Apartment No | City | State | Zip

Bkea [redacted]
Home Phone Number | Cell Phone Number

(May Check More Than One)

Gender: ☐ Male ☑ Female

Race: ☐ Asian ☐ Black ☑ White ☐ Native Hawaiian / Pacific Islander ☐ American Indian / Alaska Native

Ethnicity: ☐ Hispanic / Latino ☐ Not Hispanic / Latino

U.S. Citizen: ☑ Yes ☐ No

If no, Alien registration number

EMERGENCY CONTACT INFORMATION

[redacted]
Last Name | First | Middle Initial | Relationship

[redacted]
Home Phone Number | Cell Phone Number | Work Phone Number

WORK INFORMATION

Purchasing | Purchasing Specialist
Department | Job Title

40 hrs
Number of scheduled hours per week | Work Phone *(If applicable)*

EDUCATION

William Blount ☐ 9 ☐ 10 ☐ 11 ☑ 12 Graduated: ☑ Yes ☐ No ☐ GED
High School attended

Tusculum College | B.S. | 2004
College or University attended | Degree | Year Graduated

Janice A. Orr
Employee Signature | Date

Form W-4 (2009)

Purpose. Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. Consider completing a new Form W-4 each year and when your personal or financial situation changes.

Exemption from withholding. If you are exempt, complete only lines 1, 2, 3, 4, and 7 and sign the form to validate it. Your exemption for 2009 expires February 16, 2010. See Pub. 505, Tax Withholding and Estimated Tax.

Note. You cannot claim exemption from withholding if (a) your income exceeds $950 and includes more than $300 of unearned income (for example, interest and dividends) and (b) another person can claim you as a dependent on their tax return.

Basic instructions. If you are not exempt, complete the **Personal Allowances Worksheet** below. The worksheets on page 2 further adjust your withholding allowances based on itemized deductions, certain credits, adjustments to income, or two-earner/multiple job situations.

Complete all worksheets that apply. However, you may claim fewer (or zero) allowances. For regular wages, withholding must be based on allowances you claimed and may not be a flat amount or percentage of wages.

Head of household. Generally, you may claim head of household filing status on your tax return only if you are unmarried and pay more than 50% of the costs of keeping up a home for yourself and your dependent(s) or other qualifying individuals. See Pub. 501, Exemptions, Standard Deduction, and Filing Information, for information.

Tax credits. You can take projected tax credits into account in figuring your allowable number of withholding allowances. Credits for child or dependent care expenses and the child tax credit may be claimed using the **Personal Allowances Worksheet** below. See Pub. 919, How Do I Adjust My Tax Withholding, for information on converting your other credits into withholding allowances.

Nonwage income. If you have a large amount of nonwage income, such as interest or dividends, consider making estimated tax payments using Form 1040-ES, Estimated Tax for Individuals. Otherwise, you may owe additional tax. If you have pension or annuity income, see Pub. 919 to find out if you should adjust your withholding on Form W-4 or W-4P.

Two earners or multiple jobs. If you have a working spouse or more than one job, figure the total number of allowances you are entitled to claim on all jobs using worksheets from only one Form W-4. Your withholding usually will be most accurate when all allowances are claimed on the Form W-4 for the highest paying job and zero allowances are claimed on the others. See Pub. 919 for details.

Nonresident alien. If you are a nonresident alien, see the Instructions for Form 8233 before completing this Form W-4.

Check your withholding. After your Form W-4 takes effect, use Pub. 919 to see how the amount you are having withheld compares to your projected total tax for 2009. See Pub. 919, especially if your earnings exceed $130,000 (Single) or $180,000 (Married).

Personal Allowances Worksheet (Keep for your records.)

A	Enter "1" for **yourself** if no one else can claim you as a dependent	A [redacted]
B	Enter "1" if: • You are single and have only one job; or • You are married, have only one job, and your spouse does not work; or • Your wages from a second job or your spouse's wages (or the total of both) are $1,500 or less.	B [redacted]
C	Enter "1" for your **spouse.** But, you may choose to enter "-0-" if you are married and have either a working spouse or more than one job. (Entering "-0-" may help you avoid having too little tax withheld.)	C
D	Enter number of **dependents** (other than your spouse or yourself) you will claim on your tax return	D
E	Enter "1" if you will file as **head of household** on your tax return (see conditions under **Head of household** above)	E
F	Enter "1" if you have at least $1,800 of **child or dependent care expenses** for which you plan to claim a credit (**Note.** Do **not** include child support payments. See Pub. 503, Child and Dependent Care Expenses, for details.)	F
G	**Child Tax Credit** (including additional child tax credit). See Pub. 972, Child Tax Credit, for more information. • If your total income will be less than $61,000 ($90,000 if married), enter "2" for each eligible child; then less "1" if you have three or more eligible children. • If your total income will be between $61,000 and $84,000 ($90,000 and $119,000 if married), enter "1" for each eligible child plus "1" **additional** if you have six or more eligible children.	G
H	Add lines A through G and enter total here. (**Note.** This may be different from the number of exemptions you claim on your tax return.) ▶	H

For accuracy, complete all worksheets that apply.

- If you plan to **itemize or claim adjustments to income** and want to reduce your withholding, see the **Deductions and Adjustments Worksheet** on page 2.
- If you have more than one job or are married and you and your spouse both work and the combined earnings from all jobs exceed $40,000 ($25,000 if married), see the **Two-Earners/Multiple Jobs Worksheet** on page 2 to avoid having too little tax withheld.
- If neither of the above situations applies, **stop here** and enter the number from line H on line 5 of Form W-4 below.

---------- Cut here and give Form W-4 to your employer. Keep the top part for your records. ----------

Form **W-4**
Department of the Treasury
Internal Revenue Service

Employee's Withholding Allowance Certificate

▶ **Whether you are entitled to claim a certain number of allowances or exemption from withholding is subject to review by the IRS. Your employer may be required to send a copy of this form to the IRS.**

OMB No. 1545-0074

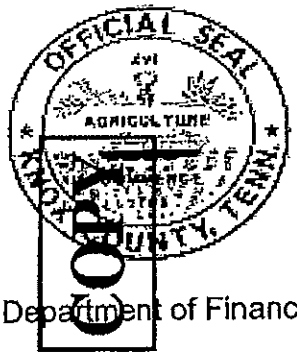
2009

1 Type or print your first name and middle initial. Janice A	Last name Orr	2 Your social security number [redacted]
Home address (number and street or rural route) [redacted]	3 [redacted] Married Married, but withhold at higher Single rate. Note. If married, but legally separated, or spouse is a nonresident alien, check the "Single" box.	
City or town, state, and ZIP code [redacted]	4 If your last name differs from that shown on your social security card, check here. You must call 1-800-772-1213 for a replacement card. ▶ ☐	
5 Total number of allowances you are claiming (from line H above or from the applicable worksheet on page 2)		5 [redacted]
6 Additional amount, if any, you want withheld from each paycheck		6 $
7 I claim exemption from withholding for 2009, and I certify that I meet **both** of the following conditions for exemption. • Last year I had a right to a refund of **all** federal income tax withheld because I had **no** tax liability **and** • This year I expect a refund of **all** federal income tax withheld because I expect to have **no** tax liability. If you meet both conditions, write "Exempt" here ▶		7

Under penalties of perjury, I declare that I have examined this certificate and to the best of my knowledge and belief, it is true, correct, and complete.

Employee's signature (Form is not valid unless you sign it.) ▶ Janice Orr **Date** ▶ 9/29/09

8 Employer's name and address (Employer: Complete lines 8 and 10 only if sending to the IRS.)	9 Office code (optional)	10 Employer identification number (EIN)



OFFICE OF COUNTY MAYOR

Department of Finance · 400 Main Street, Suite 630, Knoxville, TN 37902

Designation of Beneficiary for Wages or Salary Due at Time of Death

Name of Employee: Janice Orr

Address: [redacted]

City: [redacted] State: [redacted] Zip Code: [redacted]

Social Security Number: [redacted]

Date of Birth: [redacted]

I, (Employee Name) Janice A. Orr pursuant to Code of Tennessee 30-2-103, hereby Designate (Beneficiary Name) [redacted] my (relationship to employee) [redacted] to receive payment for any wages or salary due me at the time of my death. I direct my employer Knox County Government to pay to said designated beneficiary any wages or salary due me at the time of my death.

Employee Signature: Janice A. Orr Date: 9/29/09

OFFICE OF COUNTY MAYOR

Human Resources Division • 400 Main Street, Suite 360, Knoxville, TN 37902

I have received a copy of the Knox County Employee Handbook (Version 2004-1) and understand that I have an obligation to read the policies therein.

I understand that this Employee Handbook is not a contract.

I also understand this Employee Handbook remains the property of Knox County.

Janice Ann Orr

Employee Printed Name

Janice Ann Orr

Employee Signature

9/29/09

Date

ph 865.215.2321 • fax 865.215.2474

OFFICE OF COUNTY MAYOR

Human Resources Division. 400 Main Street, Suite360, Knoxville, TN 37902

Knox County Code of Ethics Acknowledgement

I have received a copy of the Knox County Code of Ethics as revised by the Commission on January 28 and signed by the Mayor on February 6, 2008 and confirm that I have either read the policy or have had it read to me and that I agree to abide by the terms.

I understand that this is not a contract of employment

Janice Ann Orr

Employee Printed Name

Janice Ann Orr

Employee Signature

9/29/09

Date

Payroll
Ben
Ret
HR Finance

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Knox County Government

Name / Address Change

Employee # [redacted]

Effective Date of Change 1/11/10

Indicate Change:
- ☐ Name *(Please provide a copy of your updated Social Security Card)*
- ☒ Address ☐ Emergency Contact
- ☐ Marital Status *Check new status (☐ Married ☐ Divorced)
- ☐ Other _____

Reason: Moved

NEW—NAME/ADDRESS

Former Last Name	First	Middle Initial
ORR	JANICE	A
Last Name	First	Middle Initial

Street Address	Apartment No.	City	State	Zip
[redacted]		[redacted]		

Phone Number	E-Mail Address
[redacted]	janice.orr@knoxcounty.org

Date of Birth	Social Security Number
[redacted]	[redacted]

NEW—EMERGENCY CONTACT

Last Name	First	Middle Initial	Relationship
[redacted]	[redacted]	[redacted]	[redacted]

Home Phone Number	Cell Phone Number	Work Phone Number
[redacted]	[redacted]	[redacted]

SIGNATURES

Employee	Date
	1/11/2010

Comments:

YOU HAVE 30 DAYS TO NOTIFY BENEFITS OF YOUR CHANGE

*Return form to Human Resources Department Rm. 360 City County Building

SENSITIVE INFORMATION TREAT AS CONFIDENTIAL

RECEIVED JAN 2 6 2010

Employee # [redacted]

Knox County Government

Employee Performance Appraisal

Appraisal Period 09-29-09 to 01-29-10 Process Level Finance Dept. Purchasing

Name Janice Orr Date of Hire 09-29-09

Job Title Purchasing Specialist

Type of Review: [X] Probationary (*3 Months*) [ ] Probationary (*6 Months*) [ ] Probationary (*9 Months*)

[ ] Annual [ ] Other:

INSTRUCTIONS

Knox County Government is committed to supporting informed, motivated employees who are dedicated to improving the quality and effectiveness of their performance. This evaluation addresses the job expectations and performance of this employee. It also provides a basis for developing future expectations.

In completing this evaluation, rate the employee according to the *standards of the job*. This includes reviewing the job description and considering the level of performance expected of a qualified employee. Do not rate the employee against other employees. Instead, use the expectations of the written job description as the basis of comparison.

Please check one of five categories of performance for each item. These five categories are:

5 – Consistently performs above job standards
4 – Occasionally performs above job standards
3 – Meets job standards
2 – Occasionally performs below job standards
1 – Consistently performs below job standards

NOTE: Completed appraisal forms contain sensitive information and must be handled accordingly.

Check one response for each item

Performance Compared to Job Standards

	Consistently performs above job standards	Occasionally performs above job standards	Meets job standards	Occasionally performs below job standards	Consistently performs below job standards
Job Knowledge					
Possesses knowledge necessary for assigned job	[ ] 5	[ ] 4	[X] 3	[ ] 2	[ ] 1
Applies knowledge to assigned job	[ ] 5	[ ] 4	[X] 3	[ ] 2	[ ] 1
Increases knowledge through formal training, self-study, or mentoring	[ ] 5	[ ] 4	[X] 3	[ ] 2	[ ] 1

Comments:

Revised Dec. 2008

Performance Compared to Job Standards

Job Duties

	Consistently performs above job standards	Occasionally performs above job standards	Meets job standards	Occasionally performs below job standards	Consistently performs below job standards
Quality of Work: *Produces thorough, acceptable work*	☐ 5	☐ 4	☒ 3	☐ 2	☐ 1
Quantity of Work: Produces acceptable volume of work	☐ 5	☐ 4	☒ 3	☐ 2	☐ 1
Cooperatively accepts non-routine tasks	☐ 5	☐ 4	☒ 3	☐ 2	☐ 1
Demonstrates appropriate customer service to public, clients, and/or Knox County employees	☐ 5	☒ 4	☐ 3	☐ 2	☐ 1

Comments:

Janice has a pleasing personality and demonstrates top-quality customer service skills. Janice does an excellent job processing the office supply orders for the departments and she willing assists the buying staff upon request.

Leadership

Demonstrates initiative (takes effective action without being told)	☐ 5	☒ 4	☐ 3	☐ 2	☐ 1
Demonstrates adaptability (accepts change and learns new assignments quickly)	☐ 5	☒ 4	☐ 3	☐ 2	☐ 1
Takes corrective actions as needed	☐ 5	☐ 4	☒ 3	☐ 2	☐ 1
Gives regular, appropriate feedback to others	☐ 5	☐ 4	☒ 3	☐ 2	☐ 1
Effectively manages the performance of employees *(skip if not applicable)*	☐ 5	☐ 4	☐ 3	☐ 2	☐ 1
Completes formal appraisals of supervised employees as scheduled *(skip if not applicable)*	☐ 5	☐ 4	☐ 3	☐ 2	☐ 1

Comments:

Promotes Accuracy

Follows established policies and procedures	☐ 5	☐ 4	☒ 3	☐ 2	☐ 1
Provides accurate information to others	☐ 5	☐ 4	☒ 3	☐ 2	☐ 1
Seeks information to reduce/eliminate errors	☐ 5	☐ 4	☒ 3	☐ 2	☐ 1
Maintains confidentiality of information and records *(skip if not applicable)*	☐ 5	☐ 4	☐ 3	☐ 2	☐ 1

Comments:

Safety

Every employee is evaluated for Safety

Performance Compared to Job Standards

	Consistently performs above job standards	Occasionally performs above job standards	Meets job standards	Occasionally performs below job standards	Consistently performs below job standards
Performs work in a safe manner	☐ 5	☐ 4	☒ 3	☐ 2	☐ 1
Looks out for the safety of others	☐ 5	☐ 4	☒ 3	☐ 2	☐ 1

Comments:

Janice completed all of the required online Webnet Training Courses.

Communication

Provides others with appropriate information	☐ 5	☐ 4	☒ 3	☐ 2	☐ 1
Communicates at a level appropriate to the situation (ensures understanding)	☐ 5	☐ 4	☒ 3	☐ 2	☐ 1
Is courteous in interactions with others	☐ 5	☐ 4	☒ 3	☐ 2	☐ 1

Comments:

Janice communicates and interacts well with co-workers and vendors.

Problem Solving

Breaks down problems into parts, prioritizes, and develop solutions	☐ 5	☐ 4	☒ 3	☐ 2	☐ 1
Offers constructive suggestions for improvements	☐ 5	☐ 4	☒ 3	☐ 2	☐ 1
Seeks assistance/advice when needed	☐ 5	☐ 4	☒ 3	☐ 2	☐ 1

Comments:

Stewardship & Responsibility

Follows policies for attendance and punctuality	☐ 5	☐ 4	☒ 3	☐ 2	☐ 1
Uses tools, equipment, supplies, and other resources with care	☐ 5	☐ 4	☒ 3	☐ 2	☐ 1
Demonstrates integrity, honors agreements	☐ 5	☐ 4	☒ 3	☐ 2	☐ 1
Meets deadlines, is dependable	☐ 5	☐ 4	☒ 3	☐ 2	☐ 1

Comments:

Janice needs to notify supervisors when she will be tardy and/or absent from work.

Total Score *(add all ratings)* 81

Average Score *(total divided by number of items rated)* 3.12

Revised Dec. 2008

Goals

I would like to be considered for advancement to higher level positions for which I am qualified ☒ Yes ☐ No

I would like to be considered for management or supervisory positions for which I am qualified. ☒ Yes ☐ No

Employee Signature Janice Orr

Progress on Goal(s) from Previous Appraisal Period:

☐ Goal(s) Completed ☐ Acceptable Progress ☐ Little or No Progress ☒ N/A

At least one goal must be established for each appraisal period.

A. Performance Goal 1:

Study and Test for CTAS Certification and take computer training classes offered by I.T. (Access and Excel) and take classes offered by Human Resources.

Due Date for Goal 1: 12-31-10 Date Goal 1 Completed:

If additional space for goals is required, please attach a separate sheet

The employee and supervisor should jointly develop these goals and agree on their value to Knox County Government, the work unit, and the employee

Appraisal Acknowledgement

A. Manager's comments (optional)

Janice has adapted well to her position and she has become acclimated with the BuySpeed and Lawson Software. She is a fast learner and a self-starter. Janice never hesitates when asked to do non-routine tasks and she is an asset to the Purchasing Division.

B. I agree with this appraisal. Michael F. Roemer [redacted] 1/15/10

Next Level Manager's Signature Emp. # Date

C. Appraisal jointly reviewed. Janice Orr 1/19/10 Jerry F Burns 1-19-10

Employee's Signature Date Manager's Signature Date

[redacted] 215-5752

Manager's Emp. # Manager's Phone #

D. Employee's comments (optional)

Please see attached notes

Janice Orr
Employee Number: [redacted]
January 19, 2010
Three Month Evaluation

Job Responsibilities	Feedback
Office Supplies	Successfully completed over 300 Purchase Orders
Paper Requisitions On-Line Requisitions	Ongoing Ongoing
Web Net Training	Completed web net training courses 11/25/09
Employee Ethics and Standards	Completed on 11/15/09
Vendor Registration	Gaining more knowledge of system daily. The Buying Team has contributed a very high level of training. Because of this training I feel I have learned the system quicker and more efficiently. I am at a comfortable level with vendor registration. Knox County Vendor Application - Ongoing
Supplier Diversity	Working On: Supplier Diversity Program- Ongoing Supplier Diversity Program – Updated; Purchasing – Robert is requesting power point "What is Finance/Purchasing? Open Bids – Send Weekly to Libraries Business On Demand - Ongoing
Deputy Director of Finance	Knox County Disparity Study – Completed Miscellaneous Projects – Completed in a timely manner
Buyer(s)	Unacknowledged Purchase Order Reports Bid Notifications that are returned unsuccessful Assisting Buyers on inputting quotes
Purchasing Office Supplies	Ongoing
CTAS	Due to some problems with CTAS. I am unable to retrieve password. This was initiated from 11-01-09
Knoxville News Sentinel	Fill in person for Data Entry Supervisor – When needed
Comments:	

RECEIVED JAN 2 8 2010

Knox County Government

Employment Change

Requisition # _____ Effective Date of Change 2-1-10 Employee # [redacted]

Supervisor Use Only

Actions: ☒ Reclassification ☐ Other _____
☐ Status Change ☐ Transfer ☐ Salary Adjustment

Last Name: [redacted] First: Janice Middle Initial: A

Street Address: [redacted] Apartment No. [redacted] City [redacted] State [redacted] Zip [redacted]

Current Status	New Status
▪ Annual Hours 2080 (Sheriff's Dept. Only) Shift _____ (Scheduled)	▪ Annual Hours 2080 (Sheriff's Dept. Only) Shift _____ (Schedule)
▪ ☑ Salary Annual Salary $ 24,435.57	▪ ☑ Salary Annual Salary $ 29,103.07
▪ ☐ Hourly Hourly Rate $ _____	▪ ☐ Hourly Hourly Rate $ _____
▪ Pay Grade 11 Step 2	▪ Pay Grade 14 Step 1 ✓
▪ Process Level FINAC	▪ Process Level FINAC
▪ Dept Code PURCH 1 Union Code	▪ Dept Code PURCH 1 Union Code
▪ Accounting Unit # 10060 10	▪ Accounting Unit # 10060 10
▪ (Grants Only) Activity # _____	▪ (Grants Only) Activity # _____
▪ Job Code/Position 1640-001	▪ Job Code/Position 1654-001 ✓
▪ Job Title Purchasing Specialist	▪ Job Title Purchasing Card Coordinator
Status: ☑ A1 (Active/Full-time 30hrs & over) ☐ A2 (Active/Part-time 18.5 to 29 hr) ☐ A3 (Active/Part-time under 18.5 hr) ☐ A4 (Seasonal, Temp, Interns) ☐ (Other) _____	Status: ☑ A1 (Active/Full-time 30hrs & over) ☐ A2 (Active/Part-time 18.5 to 29 hr) ☐ A3 (Active/Part-time under 18.5 hr) ☐ A4 (Seasonal, Temp, Interns) ☐ (Other) _____

Comments _____

Human Resources Use Only

FTE _____ EE04 Functional Group _____ Base Annual Hours _____

Payroll Use Only

☐ Exempt ☐ Non Exempt

Pay Plan _____ Automatic Time Record ☐ Yes ☐ No

Automatic Deposit ☐ Yes ☐ No Expense Account _____

Comments _____

Approvals

1) Supervisor	1-28-2010 Date	6) Senior Director of Finance	Date
2) Department Manager/Director	1-28-10 Date	7) County Mayor (If New Position)	Date
3) Senior Director	Date	8) Payroll Department	Date
4) Compensation	2-4-10 Date	9) Payroll Department	Date
5) Human Resources Director	2-5-10 Date		

Finac

RECEIVED MAR 15 2010

Knox County Government

Employee Requisition

(Provided by HR) Employee # _____

Requisition # 788

Date Posted 3-15-10

Process Level Finac

Department Purchasing

Accounting Unit # 1006010

Job Code 11653-001

Starting Salary _____

Activity Number _____

Job Title Procurement Card Administrator

Schedule 2080AF410 Pay Grade 22 Step _____

REPLACEMENT

Is this a replacement? ☒ Yes ☐ No (If yes, provide information below)

Name of person being replaced Matthew T. Munafo

Employee # [redacted]

Soc. Sec. # of person being replaced [redacted]

Date of Transfer / Termination 10/26/2010

HUMAN RESOURCES REQUEST

I would like H.R. Assistance in: Conducting interviews ☐

Post: ☐ 1 Week ☒ 2 Weeks ☐ Other _____ Newspaper Advertisement Yes ☒ No ☐

I understand that this position will be posted at the minimum requirements stated on the current job description.

A. G. Holt

Supervisor's Signature

POSITION STATUS: (check one)

Base Annual Hours 2080 Pay Method: ☐ Hourly ☒ Salary *(Sheriff's Dept. Only)* Shift _____

☒ Full-time 80 hours per pay period

☐ Full-time 75 hours per pay period

☐ Part-time _____ hours per pay period

☐ Temporary _____ *hours per pay period*

SIGNATURES

Matthew T. Munafo 3-15-10

1) Supervisor Date

A. G. Holt 3-15-10

2) Department Manager/Director Date

John Troyer

3) Senior Director Date

Debbie Dew 3-15-10

4) Compensation ~~Manager~~ Date

Frances Fogerson 3-15-10

5) Human Resources Director Date

6) Budget Approval Date

John Troyer

7) Senior Director of Finance Date

8) County Mayor *(If New Position)* Date

9) Payroll Department Date

KNOX COUNTY GOVERNMENT

POSITION OPEN

Procurement Card Administrator
Purchasing Department

1653-001

PURPOSE OF CLASSIFICATION: The purpose of this classification is to perform professional and administrative duties in the development, coordination and maintenance of contracts for Knox County. Duties include, but are not limited to: assisting in the administering of a contracts compliance system; assisting the Contracts Administrator in the administration and coordination of all contracts not delegated to a specific department or authority; evaluating bids and proposals to determine "Best Value", proposal responses, pricing data, scope of services and contract terms; and performing other duties as assigned by the Deputy Director Purchasing.

ESSENTIAL FUNCTIONS: The following duties are normal for this position. These are not to be construed as exclusive or all-inclusive. Other duties may be required and assigned. Administers the Procurement Card Program (approves applications, issues cards, conducts training, establishes objectives, resolves billing disputes, provides reporting, etc.) Monitors the purchasing practices of cardholders. Monitors all contracting activities of the County, in order to identify opportunities for procurement card usage. Formulates and prepares requests for proposals and invitations for bid, and all credit card related services. Evaluates bids and proposals to determine "Best Value". Evaluates proposal responses, pricing data, scope of services and contract terms. Formulates and implements procurement card policies and procedures. Manages procurement card software. Exports accounting information for final authorization. Prepares and manages County budget for program. Administers all contracts for credit card services. Promotes procurement card program use among departments. Assists Professional Buying Staff in promoting procurement card usage. Approves purchasing card applications. Issues purchasing cards. Maintains purchasing card participant files. Reviews purchasing card inventory reports. Conducts training of current or future cardholders and participants. Coordinates issuance and cancellation of cards. Coordinates program policy issues. Conducts ongoing program and manual reviews. Participates in resolving billing disputes. Monitors the purchasing practices of cardholders. Maintains policy and cardholder guides and manuals. Targets new cardholders and expanded use of card. Establishes and monitors benchmarking objectives. Evaluates purchasing card feedback from suppliers. Handles reporting requirements, including small and minority business. Oversees department implementation plans. Participates in producing an operations manual. Reviews credit limits on cards. Consults, coordinates and delivers software enhancements. Communicates with participants relating to changes, updates, etc. in the program. Tracks reconciliation among participants. Exports procurement card accounting data to be uploaded into the County Financial management system. Maintains procurement card software database. Conducts risk assessment on periods basis. Consults suppliers on procurement card use and benefits. Prepares and manages County budget for program.

ADDITIONAL JOB FUNCTIONS: Responds to and reports immediately if called upon by local regional or central office supervisors, as part of a coordinated emergency response by the Knox County Department of Health. Performs other related duties as required.

MINIMUM TRAINING AND QUALIFICATIONS: Bachelor's degree in Business Administration, Finance or related field; supplemented by six (6) or more years experience; or any equivalent combination of education, training, and experience which provides the requisite knowledge, skills, and abilities for this position. A Certified Professional Public Buyer (CPPB) and Certified Procurement Card Professional certifications are required within 18 months of hire date.

PHYSICAL REQUIREMENTS: Must be physically able to operate a variety of office machines and equipment such as personal computers, printers, PC projectors, VCR and monitors, scanners, telephones, calculators, photocopiers, and fax machines. Must be able to use body members to work, move or carry objects or materials. Physical demand requirements are at levels of those for sedentary work.

SALARY: D.O.E.

DEADLINE: Applications must be received in the office by March 29, 2010 (4:30 p.m.)

If you need reasonable accommodations to complete an application or for an interview, please contact the Department of Human Resources. Some accommodations take several days to arrange. Please notify us early to make the arrangements. **Non-discrimination:** Knox County prohibits discrimination in employment on the basis of race, color, sex, age, religion, national origin, and disability status.

APPLY TO:

Knox County Human Resources, Room 360, City/County Building, 400 Main Street, Knoxville, TN 37902. Knox County is an Equal Opportunity Employer.

SENSITIVE INFORMATION TREAT AS CONFIDENTIAL

RECEIVED MAR 2 5 2010 Employee # [redacted]

Knox County Government

Employee Performance Appraisal

Appraisal Period 12/29/09 to 03/29/10 Process Level Finance Dept. Purchasing

Name Janice Orr Date of Hire 09-29-09

Job Title Purchasing Specialist

Type of Review: ☐ Probationary (3 Months) ☒ Probationary (6 Months) ☐ Probationary (9 Months)

☐ Annual ☑ Other:

INSTRUCTIONS

Knox County Government is committed to supporting informed, motivated employees who are dedicated to improving the quality and effectiveness of their performance. This evaluation addresses the job expectations and performance of this employee. It also provides a basis for developing future expectations.

In completing this evaluation, rate the employee according to the standards of the job. This includes reviewing the job description and considering the level of performance expected of a qualified employee. Do not rate the employee against other employees. Instead, use the expectations of the written job description as the basis of comparison.

Please check one of five categories of performance for each item. These five categories are:

5 – Consistently performs above job standards
4 – Occasionally performs above job standards
3 – Meets job standards
2 – Occasionally performs below job standards
1 – Consistently performs below job standards

NOTE: Completed appraisal forms contain sensitive information and must be handled accordingly.

Check one response for each item

Performance Compared to Job Standards

	Consistently performs above job standards	Occasionally performs above job standards	Meets job standards	Occasionally performs below job standards	Consistently performs below job standards
Job Knowledge					
Possesses knowledge necessary for assigned job	☐ 5	☐ 4	☒ 3	☐ 2	☐ 1
Applies knowledge to assigned job	☐ 5	☐ 4	☒ 3	☐ 2	☐ 1
Increases knowledge through formal training, self-study, or mentoring	☐ 5	☐ 4	☒ 3	☐ 2	☐ 1

Comments:

Job Duties

Performance Compared to Job Standards

	Consistently performs above job standards	Occasionally performs above job standards	Meets job standards	Occasionally performs below job standards	Consistently performs below job standards
Quality of Work: Produces thorough, acceptable work	☐ 5	☐ 4	☒ 3	☐ 2	☐ 1
Quantity of Work: Produces acceptable volume of work	☐ 5	☒ 4	☐ 3	☐ 2	☐ 1
Cooperatively accepts non-routine tasks	☐ 5	☐ 4	☒ 3	☐ 2	☐ 1
Demonstrates appropriate customer service to public, clients, and/or Knox County employees	☐ 5	☒ 4	☐ 3	☐ 2	☐ 1

Comments:

This quarter Janice has been in training under the supervision of the Procurement Card Administrator learning all about Knox County Procurement Card Policies.

Leadership

Demonstrates initiative (takes effective action without being told)	☐ 5	☒ 4	☐ 3	☐ 2	☐ 1
Demonstrates adaptability (accepts change and learns new assignments quickly)	☐ 5	☒ 4	☐ 3	☐ 2	☐ 1
Takes corrective actions as needed	☐ 5	☐ 4	☒ 3	☐ 2	☐ 1
Gives regular, appropriate feedback to others	☐ 5	☐ 4	☒ 3	☐ 2	☐ 1
Effectively manages the performance of employees *(skip if not applicable)*	☐ 5	☐ 4	☐ 3	☐ 2	☐ 1
Completes formal appraisals of supervised employees as scheduled *(skip if not applicable)*	☐ 5	☐ 4	☐ 3	☐ 2	☐ 1

Comments:

Promotes Accuracy

Follows established policies and procedures	☐ 5	☐ 4	☒ 3	☐ 2	☐ 1
Provides accurate information to others	☐ 5	☐ 4	☒ 3	☐ 2	☐ 1
Seeks information to reduce/eliminate errors	☐ 5	☐ 4	☒ 3	☐ 2	☐ 1
Maintains confidentiality of information and records *(skip if not applicable)*	☐ 5	☐ 4	☐ 3	☐ 2	☐ 1

Comments:

	Performance Compared to Job Standards				
	Consistently performs above job standards	Occasionally performs above job standards	Meets job standards	Occasionally performs below job standards	Consistently performs below job standards
Safety *Every employee is evaluated for Safety*					
Performs work in a safe manner	☐ 5	☐ 4	☒ 3	☐ 2	☐ 1
Looks out for the safety of others	☐ 5	☐ 4	☒ 3	☐ 2	☐ 1

Comments:

Complete the required Web Net Training Courses for FY 2010

Communication

Provides others with appropriate information	☐ 5	☐ 4	☒ 3	☐ 2	☐ 1
Communicates at a level appropriate to the situation (ensures understanding)	☐ 5	☐ 4	☒ 3	☐ 2	☐ 1
Is courteous in interactions with others	☐ 5	☐ 4	☒ 3	☐ 2	☐ 1

Comments:

Problem-Solving

Breaks down problems into parts, prioritizes, and develop solutions	☐ 5	☐ 4	☒ 3	☐ 2	☐ 1
Offers constructive suggestions for improvements	☐ 5	☐ 4	☒ 3	☐ 2	☐ 1
Seeks assistance/advice when needed	☐ 5	☐ 4	☒ 3	☐ 2	☐ 1

Comments:

Stewardship & Responsibility

Follows policies for attendance and punctuality	☐ 5	☐ 4	☒ 3	☐ 2	☐ 1
Uses tools, equipment, supplies, and other resources with care	☐ 5	☐ 4	☒ 3	☐ 2	☐ 1
Demonstrates integrity, honors agreements	☐ 5	☐ 4	☒ 3	☐ 2	☐ 1
Meets deadlines, is dependable	☐ 5	☐ 4	☒ 3	☐ 2	☐ 1

Comments:

Total Score *(add all ratings)* 82

Average Score *(total divided by number of items rated)* 3.15

Revised Dec. 2008

Goals

I would like to be considered for advancement to higher level positions for which I am qualified ☒ Yes ☐ No

I would like to be considered for management or supervisory positions for which I am qualified. ☒ Yes ☐ No

Employee Signature

Progress on Goal(s) from Previous Appraisal Period:

☐ Goal(s) Completed ☒ Acceptable Progress ☐ Little or No Progress ☐ N/A

At least one goal must be established for each appraisal period.

A. *Performance Goal 1:*

Study and Test for CTAS Certification

Due Date for Goal 1: 12-31-10 Date Goal 1 Completed:

If additional space for goals is required, please attach a separate sheet

The employee and supervisor should jointly develop these goals and agree on their value to Knox County Government, the work unit, and the employee

Appraisal Acknowledgement

A. Manager's comments (optional)

Janice is doing an exceptional job as Procurment Card Coordinator.

B. I agree with this appraisal. Michael T. Reeves [redacted] 03/23/10

Next Level Manager's Signature Emp. # Date

C. Appraisal jointly reviewed. Janice Orr 3/23/2010 T Burns 3-24-10

Employee's Signature Date Manager's Signature Date

[redacted] 215-5752

Manager's Emp. # Manager's Phone #

D. Employee's comments (optional)

Revised Dec. 2008

SENSITIVE INFORMATION TREAT AS CONFIDENTIAL

RECEIVED SEP 2 3 2010

Employee # [redacted]

Knox County Government

Employee Performance Appraisal

Appraisal Period: April 2010 to Aug 2010 | Process Level: Finance | Dept.: Purchasing

Name: Janice A. Orr | Date of Hire: ~~4-1-2010~~ 9-29-09

Job Title: Procurement Card Administrator

Type of Review: ☐ Probationary (*3 Months*) ☑ Probationary (*6 Months*) ☐ Probationary (*9 Months*)

☐ Annual ☒ Other: 6mo. probationary for new position per H. Holt. dd 9-23-10

INSTRUCTIONS

Knox County Government is committed to supporting informed, motivated employees who are dedicated to improving the quality and effectiveness of their performance. This evaluation addresses the job expectations and performance of this employee. It also provides a basis for developing future expectations.

In completing this evaluation, rate the employee according to the *standards of the job*. This includes reviewing the job description and considering the level of performance expected of a qualified employee. Do not rate the employee against other employees. Instead, use the expectations of the written job description as the basis of comparison.

Please check one of five categories of performance for each item. These five categories are:

5 – Consistently performs above job standards
4 – Occasionally performs above job standards
3 – Meets job standards
2 – Occasionally performs below job standards
1 – Consistently performs below job standards

NOTE: Completed appraisal forms contain sensitive information and must be handled accordingly.

Check one response for each item

	Performance Compared to Job Standards				
	Consistently performs above job standards	Occasionally performs above job standards	Meets job standards	Occasionally performs below job standards	Consistently performs below job standards
Job Knowledge					
Possesses knowledge necessary for assigned job	☐ 5	☐ 4	☑ 3	☐ 2	☐ 1
Applies knowledge to assigned job	☐ 5	☐ 4	☑ 3	☐ 2	☐ 1
Increases knowledge through formal training, self-study, or mentoring	☐ 5	☐ 4	☑ 3	☐ 2	☐ 1

Comments:

Janice has learned much on her own. Good job.

Revised Dec. 2008

Performance Compared to Job Standards

Job Duties

	Consistently performs above job standards	Occasionally performs above job standards	Meets job standards	Occasionally performs below job standards	Consistently performs below job standards
Quality of Work: Produces thorough, acceptable work	☐ 5	☐ 4	☑ 3	☐ 2	☐ 1
Quantity of Work: Produces acceptable volume of work	☐ 5	☑ 4	☐ 3	☐ 2	☐ 1
Cooperatively accepts non-routine tasks	☐ 5	☐ 4	☑ 3	☐ 2	☐ 1
Demonstrates appropriate customer service to public, clients, and/or Knox County employees	☐ 5	☐ 4	☑ 3	☐ 2	☐ 1

Comments:

Janice does not need to create work for herself.

Leadership

Demonstrates initiative (takes effective action without being told)	☐ 5	☑ 4	☐ 3	☐ 2	☐ 1
Demonstrates adaptability (accepts change and learns new assignments quickly)	☐ 5	☑ 4	☐ 3	☐ 2	☐ 1
Takes corrective actions as needed	☐ 5	☐ 4	☑ 3	☐ 2	☐ 1
Gives regular, appropriate feedback to others	☐ 5	☐ 4	☑ 3	☐ 2	☐ 1
Effectively manages the performance of employees *(skip if not applicable)*	☐ 5	☐ 4	☐ 3	☑ 2	☐ 1
Completes formal appraisals of supervised employees as scheduled *(skip if not applicable)*	☐ 5	☐ 4	☑ 3	☐ 2	☐ 1

Comments:

Janice has taken initiative in creating different reports for the program. Janice must find a way to reach out to her employee to gain "buy-in" for the good of the oganization.

Promotes Accuracy

Follows established policies and procedures	☐ 5	☐ 4	☑ 3	☐ 2	☐ 1
Provides accurate information to others	☐ 5	☐ 4	☑ 3	☐ 2	☐ 1
Seeks information to reduce/eliminate errors	☐ 5	☐ 4	☑ 3	☐ 2	☐ 1
Maintains confidentiality of information and records *(skip if not applicable)*	☐ 5	☐ 4	☑ 3	☐ 2	☐ 1

Comments:

Safety

Every employee is evaluated for Safety

	Performance Compared to Job Standards				
	Consistently performs above job standards	Occasionally performs above job standards	Meets job standards	Occasionally performs below job standards	Consistently performs below job standards
Performs work in a safe manner	☐ 5	☐ 4	☑ 3	☐ 2	☐ 1
Looks out for the safety of others	☐ 5	☐ 4	☑ 3	☐ 2	☐ 1

Comments:

Communication

Provides others with appropriate information	☐ 5	☐ 4	☑ 3	☐ 2	☐ 1
Communicates at a level appropriate to the situation (ensures understanding)	☐ 5	☐ 4	☑ 3	☐ 2	☐ 1
Is courteous in interactions with others	☐ 5	☐ 4	☑ 3	☐ 2	☐ 1

Comments:

Janice needs to be sure voicemails are returned promptly.

Problem-Solving

Breaks down problems into parts, prioritizes, and develop solutions	☐ 5	☑ 4	☐ 3	☐ 2	☐ 1
Offers constructive suggestions for improvements	☐ 5	☐ 4	☑ 3	☐ 2	☐ 1
Seeks assistance/advice when needed	☐ 5	☐ 4	☑ 3	☐ 2	☐ 1

Comments:

Stewardship & Responsibility

Follows policies for attendance and punctuality	☐ 5	☐ 4	☑ 3	☐ 2	☐ 1
Uses tools, equipment, supplies, and other resources with care	☐ 5	☐ 4	☑ 3	☐ 2	☐ 1
Demonstrates integrity, honors agreements	☐ 5	☐ 4	☑ 3	☐ 2	☐ 1
Meets deadlines, is dependable	☐ 5	☐ 4	☑ 3	☐ 2	☐ 1

Comments:

Total Score *(add all ratings)* 90

Average Score *(total divided by number of items rated)* 3.10

Revised Dec. 2008

Goals

I would like to be considered for advancement to higher level positions for which I am qualified ☐ Yes ☐ No

I would like to be considered for management or supervisory positions for which I am qualified. ☐ Yes ☐ No

Employee Signature

Progress on Goal(s) from Previous Appraisal Period:

☐ Goal(s) Completed ☐ Acceptable Progress ☐ Little or No Progress ☐ N/A

At least one goal must be established for each appraisal period.

A. Performance Goal 1:

To have the Electronic Commerce Card Coordinator trained in all aspects of the program to fulfill the duties in the Administrators absence. This to include reconcilliation, training, adjustments etc.

Due Date for Goal 1: Date Goal 1 Completed:

If additional space for goals is required, please attach a separate sheet

The employee and supervisor should jointly develop these goals and agree on their value to Knox County Government, the work unit, and the employee

Appraisal Acknowledgement

A. Manager's comments (optional)

B. I agree with this appraisal. H. G. Holt [redacted] 9-21-10

Next Level Manager's Signature Emp. # Date

C. Appraisal jointly reviewed. Janice Orr 9-21-10 [redacted] 9-20-10

Employee's Signature Date Manager's Signature Date

[redacted] 5750

Manager's Emp. # Manager's Phone #

D. Employee's comments (optional)

RECEIVED APR 12 2010

Finac Purch

Knox County Government

Employment Change

Requisition # _____ Effective Date of Change 4-10-10 Employee # [redacted]

Supervisor Use Only

Actions: ☐ Reclassification ☐ Other ____ ☑ Status Change ☐ Transfer ☐ Salary Adjustment

Last Name	First	Middle Initial
Roe	Janice	A.

Street Address	Apartment No.	City	State	Zip
[redacted]		[redacted]	[redacted]	

Current Status

- Annual Hours 80 (Scheduled) (Sheriff's Dept. Only) Shift _____
- ☑ Salary Annual Salary $ 29,103.07
- ☐ Hourly Hourly Rate $ _____
- Pay Grade 14 Step 1
- Process Level FINAC
- Dept Code PURCH / Union Code
- Accounting Unit # _____
- (Grants Only) Activity # _____
- Job Code/Position 1654-001
- Job Title Procurement Card Coordinator

Status: Purchasing

- ☑ A1 (Active/Full-time 30hrs & over)
- ☐ A2 (Active/Part-time 18.5 to 29 hr)
- ☐ A3 (Active/Part-time under 18.5 hr)
- ☐ A4 (Seasonal, Temp, Interns)
- ☐ (Other)

New Status

- Annual Hours 80 (Schedule) (Sheriff's Dept. Only) Shift _____
- ☑ Salary Annual Salary $ 45,525.41
- ☐ Hourly Hourly Rate $ _____
- Pay Grade 22 Step 1
- Process Level FINAC
- Dept Code PURCH / Union Code
- Accounting Unit # _____
- (Grants Only) Activity # _____
- Job Code/Position 1653-001 ✓
- Job Title Procurement Card Administrator

Status

- ☑ A1 (Active/Full-time 30hrs & over)
- ☐ A2 (Active/Part-time 18.5 to 29 hr)
- ☐ A3 (Active/Part-time under 18.5 hr)
- ☐ A4 (Seasonal, Temp, Interns)
- ☐ (Other)

Comments: Replacing M. Munafo

Human Resources Use Only

FTE _____ EE04 Functional Group _____ Base Annual Hours _____

Payroll Use Only

☐ Exempt ☐ Non Exempt

Pay Plan

Automatic Time Record ☐ Yes ☐ No

Automatic Deposit ☐ Yes ☐ No

Expense Account _____

Comments

Approvals

1) Supervisor	4-12-10	6) Senior Director of Finance	Date
2) Department Manager/Director	4-12-10	7) County Mayor (If New Position)	Date
3) Senior Director	4/16/10	8) Payroll Department	Date
4) Compensation	4-16-10	9) Payroll Department	Date
5) Human Resources Director	4-19-10		

Stacey Rule

[redacted]

From: Janice Orr [janice.orr@knoxcounty.org]
Sent: Friday, May 21, 2010 3:04 PM
To: 'Stacey Rule'
Subject: FW: Pcard Transaction Presentation

Stacey - What would be the correct procedures to have this e-mail placed in my personnel folder?

Thank you for your assistance.

Janice Orr

-----Original Message-----
From: Larry Frank [mailto:lfrank@knoxlib.org]
Sent: Wednesday, May 05, 2010 9:37 AM
To: hugh.holt@knoxcounty.org
Cc: janice.orr@knoxcounty.org
Subject: Re: Pcard Transaction Presentation

Hugh,

Janice Orr's P Card presentation this morning was professional, very organized, concise and articulate with no waste of words and cognizant of the value of employee time. Above average delivery. In other words, you guys are doing a great job.

Larry Frank
Sr Director of Library Services

✓ Porch

JAN 14 2015

Knox County Government

Employment Change

Requisition #_____ Effective Date of Change 1/12/2015 Employee #[redacted]

Supervisor Use Only

Actions: ☐ Reclassification ☐ Other ____
☐ Status Change ☐ Transfer ☐ Salary Adjustment

Orr	Janice	A
Last Name	First	Middle Initial

[redacted]		[redacted]	[redacted]	[redacted]
Street Address	Apartment No.	City	State	Zip

Current Status

- Annual Hours 2080 *(Scheduled)* *(Sheriff's Dept. Only)* Shift _____
- ■ Salary Annual Salary $ 54,154.36
- ☐ Hourly Hourly Rate $ _____
- Pay Grade 22 Step 4
- Location/Process Level _____
- Dept Code _____ / _____ Raise Code
- ORG # 1016050
- Job Class/Position 1639-01
- Job Title Program Manager/Contract Spec.
- Next Level Supervisor (Name/#)_____

Status
- ■ A1 (Active/Full-time 30hrs & over)
- ☐ A2 (Active/Part-time 18.5 to 29 hr)
- ☐ A3 (Active/Part-time Temp/Seasonal)
- ☐ A6 (Salary Supplement)
- ☐ (Other) _____

New Status

- Annual Hours 2080 *(Schedule)* *(Sheriff's Dept. Only)* Shift _____
- ■ Salary Annual Salary $ 60,567.28
- ☐ Hourly Hourly Rate $ _____
- Pay Grade 22 Step 7
- Location/Process Level _____
- Dept Code _____ / _____ Raise Code
- ORG # _____
- Job Class/Position _____
- Job Title _____
- Next Level Supervisor (Name/#)_____

Status
- ■ A1 (Active/Full-time 30hrs & over)
- ☐ A2 (Active/Part-time 18.5 to 29 hr)
- ☐ A3 (Active/Part-time Temp/Seasonal)
- ☐ A6 (Salary Supplement)
- ☐ (Other) _____

Comments _____

Payroll Use Only

☐ Exempt ☐ Non Exempt

Leave Plan ☐ Yes ☐ No

Automatic Deposit ☐ Yes ☐ No

Tax Deductions ☐ Yes

Automatic Time Record ☐ Yes ☐ No

Pay Code _____

Comments

Approvals

1) Supervisor [redacted] Emp# 1-13-15 Date

2) Department Manager/Director Date 1-13-15

3) Senior Director Date 1/14/15

4) Compensation Date 1-20-15

5) Human Resources Director Date 1-20-2015

6) Position Control Manager Date

7) County Mayor *(If New Position)* Date

8) Payroll Date

9) Payroll Date

Employee No: [redacted]

RECEIVED JAN 25 2011

Performance Evaluation Form

Employee Information			
Employee Name:	Janice A. Orr	Job Title:	Procurement Card Administrator
Department:	Purchasing	Reviewer:	Matthew F. Myers
Date of Hire:	9-29-2009	Review Period:	From: 1-01-10 To: 12-31-10

Type of Review: ☐ Probation (*6 months*) ☒ Annual ☐ Other_____

Results Achieved During Review Period

List the goals/expectations for the review period. (If there were no goals set for this review period, check this box ☐.)

Have the Procurement Card Administrator trained in all aspects of the Electronic Card Program and become proficient in the use of the County's new financial management software (Munis).

Evaluate how the employee did on achieving those goals during the review period.

Janice has met both these goals.

Ratings Description for the following Performance Factors

5 Outstanding	The employee consistently performs far beyond the goals/expectations and makes exceptional contributions.
4 Highly Effective	The employee consistently *exceeds* goals/expectations.
3 Effective	The employee consistently *meets* the goals/expectations.
2 Needs Improvement	The employee does not satisfy the duties and requirements on a consistent basis.
1 Unacceptable	The employee is unable to carry out the duties and responsibilities. Immediate and significant improvement is needed.

Review the employee on the performance factors described below. Place an 'X' in the appropriate box next to the performance factor category to indicate the rating level for each factor. Provide examples to support your conclusions under the comments area.	Outstanding	Highly Effective	Effective	Needs Improvement	Unacceptable
Performance Factors					
1. Job Knowledge			X		
• Demonstrates strong technical/operational knowledge commensurate with time on job. • Keeps abreast of industry developments. Applies knowledge to achieve results. • Seeks opportunities to learn.					
Comments:					
2. Quality of Work			X		
• Work is accurate and meets clients and/or department expectations. • Demonstrates thoroughness and completeness in work responsibilities. • Achieves goals.					
Comments: Janice has done a good job with the Electronic Acquisition Card program.					
3. Productivity		X			
• Effectively organizes and plans work. • Prioritizes work and stays on tasks, making adjustments as new information &/or assignments are introduced. • Produces an appropriate volume of work. • Meets deadlines.					
Comments:					
4. Initiative	X				
• Demonstrates resourcefulness and originates productive action on assignments. • Motivates self and does not wait to be given an assignment. • Is proactive to offer solutions; has an "I can help" attitude versus an "it's not my job/problem" approach.					
Comments: Janice is always looking for ways to increase spend on the E-Card. Has worked diligently to identify transactions for PO to Ecard diversion.					
5. Communication			X		
• Communicates clearly and effectively verbally and in writing. • Practices effective listening skills. • Works to enhance working relationships by opening up communication channels.					
Comments: Janice is not afraid to ask questions or make comments in regards to her position.					

Review the employee on the performance factors described below. Place an 'X' in the appropriate box next to the performance factor category to indicate the rating level for each factor. Provide examples to support your conclusions under the comments area.	Outstanding	Highly Effective	Effective	Needs Improvement	Unacceptable
Performance Factors, continued					
6. Judgment/Decision-Making			X		
• Analyzes available information and makes sound, timely decisions. • Accepts responsibility for decisions, and learns from mistakes. • Is creative and develops innovative solutions.					
Comments: Janice makes calculated decisions regarding the E-Card program.					
7. Professionalism/Interpersonal Effectiveness			X		
• Operates in a manner appropriate to the business environment. • Works effectively with others; promotes a cohesive and productive team environment. • Strives for organization effectiveness and team results versus individual gain. • Develops supportive and positive working relationships with clients, colleagues, and vendors. • Manages conflict constructively.					
Comments: Janice has done a good job with respect to her employee.					
8. Accountability/Dependability			X		
• Meets attendance expectations. • Keeps commitments to others. • Accepts responsibility and accomplishes tasks.					
Comments:					

Summary of Performance

Reviewer Comments. (Summarize the employee's strengths *and* list the area(s) that the employee needs to work on. Include areas that can either be leveraged for career development or that can limit career advancement.)

Janice has done an excellent job on re-inventing the card E-Card program. She is always looking for spend opportunities.
Nice job Janice.
MFM

Goals/expectations to be achieved during the upcoming review period

List performance objectives. (Objectives should be specific, realistic, and measurable.). Identify keys to success for achieving each objective. For example, resources, tools or other kinds of support.

Pass her NAPCP test in October and increase spend on Ecard.

Signatures

Employee Comments:

Employee Signature Janice A. Orr ***Emp. No.*** [redacted] ***Date*** 1-14-11

(By signing this form, the employee verifies that the performance evaluation discussion has occurred. Signing this form does not indicate that the employee agrees or disagrees with the evaluation.)

Reviewer Signature [signature] ***Emp No.*** [redacted] ***Date*** 1-14-11

2nd Level Reviewer Signature [signature] ***Emp. No.*** [redacted] ***Date*** 1-18-2011

Overall Performance Rating

Total Score: 27
(Add all ratings)

Average Score: 3.38
(Total divided by number of items)

Employee No. [redacted]

RECEIVED JAN 2 5 2012

Performance Evaluation Form

Employee Information			
Employee Name:	Janice Orr	**Job Title:**	Procurement Card Administrator
Department:	Purchasing	**Reviewer:**	Matthew F. Myers
Date of Hire:	9-29-2009	**Review Period:**	**From:** 1-01-2011 **To:** 12-31-2011

Type of Review: ☐ **Probation (*6 months*)** ☒ **Annual** ☐ **Other**_____

Results Achieved During Review Period

List the goals/expectations for the review period. (If there were no goals set for this review period, check this box ☐.)

To have the Electronic Commerce Card Coordinator trained in all aspects of the program to fulfill the duties in the Administrators absence.

Evaluate how the employee did on achieving those goals during the review period.

This goal has been accomplished. The Coordinator can effectively support the program in the Administrators absence.

Ratings Description for the following Performance Factors

5 Outstanding	The employee consistently performs far beyond the goals/expectations and makes exceptional contributions.
4 Highly Effective	The employee consistently *exceeds* goals/expectations.
3 Effective	The employee consistently *meets* the goals/expectations.
2 Needs Improvement	The employee does not satisfy the duties and requirements on a consistent basis.
1 Unacceptable	The employee is unable to carry out the duties and responsibilities. Immediate and significant improvement is needed.

Review the employee on the performance factors described below. Place an 'X' in the appropriate box next to the performance factor category to indicate the rating level for each factor. Provide examples to support your conclusions under the comments area.	Outstanding	Highly Effective	Effective	Needs Improvement	Unacceptable
Performance Factors					
1. Job Knowledge			X		
• Demonstrates strong technical/operational knowledge commensurate with time on job. • Keeps abreast of industry developments. Applies knowledge to achieve results. • Seeks opportunities to learn.					
Comments:					
2. Quality of Work			X		
• Work is accurate and meets clients and/or department expectations. • Demonstrates thoroughness and completeness in work responsibilities. • Achieves goals.					
Comments:					
3. Productivity		X			
• Effectively organizes and plans work. • Prioritizes work and stays on tasks, making adjustments as new information &/or assignments are introduced. • Produces an appropriate volume of work. • Meets deadlines.					
Comments: Janice handles a large volume of transactions each year. She is working hard to increase spend across the County.					
4. Initiative		X			
• Demonstrates resourcefulness and originates productive action on assignments. • Motivates self and does not wait to be given an assignment. • Is proactive to offer solutions; has an "I can help" attitude versus an "it's not my job/problem" approach.					
Comments: Janice is always looking for new uses for the E-Procurement Card.					
5. Communication			X		
• Communicates clearly and effectively verbally and in writing. • Practices effective listening skills. • Works to enhance working relationships by opening up communication channels.					
Comments:					

Review the employee on the performance factors described below. Place an 'X' in the appropriate box next to the performance factor category to indicate the rating level for each factor. Provide examples to support your conclusions under the comments area.	Outstanding	Highly Effective	Effective	Needs Improvement	Unacceptable
Performance Factors, continued					
6. Judgment/Decision-Making			X		
• Analyzes available information and makes sound, timely decisions. • Accepts responsibility for decisions, and learns from mistakes. • Is creative and develops innovative solutions.					
Comments:					
7. Professionalism/Interpersonal Effectiveness			X		
• Operates in a manner appropriate to the business environment. • Works effectively with others; promotes a cohesive and productive team environment. • Strives for organization effectiveness and team results versus individual gain. • Develops supportive and positive working relationships with clients, colleagues, and vendors. • Manages conflict constructively.					
Comments:					
8. Accountability/Dependability				X	
• Meets attendance expectations. • Keeps commitments to others. • Accepts responsibility and accomplishes tasks.					
Comments: Janice needs to understand the importance of being at work, on time and her role as Administrator of the E-Procurement Program. She continually asks to arrive late and leave early.					

Summary of Performance

Reviewer Comments. (Summarize the employee's strengths *and* list the area(s) that the employee needs to work on. Include areas that can either be leveraged for career development or that can limit career advancement.)

Janice is very focused on expanding the use of the E-Procurement Card and looks for ways to increase spend. However, she needs to be very sure that all transactions are done in accordance with the Procurement Code and that proper documentation is present.

Goals/expectations to be achieved during the upcoming review period

List performance objectives. (Objectives should be specific, realistic, and measurable.). Identify keys to success for achieving each objective. For example, resources, tools or other kinds of support.

Continue to work with Vendors and Buyers to increase participation and spend.

Signatures

Employee Comments:

Employee Signature Janice Ann ***Emp. No*** [redacted] ***Date*** 1/20/12

(By signing this form, the employee verifies that the performance evaluation discussion has occurred. Signing this form does not indicate that the employee agrees or disagrees with the evaluation.)

Reviewer Signature [signature] ***Emp No.*** [redacted] ***Date*** 1-20-12

2nd Level Reviewer Signature [signature] ***Emp. No*** [redacted] ***Date*** 1-20-2012

Overall Performance Rating

Total Score: 25 **(Add all ratings)**

Average Score: 3.13 **(Total divided by number of items)**

Employee No. [redacted]

RECEIVED FEB 0 4 2013

Performance Evaluation Form

Employee Information			
Employee Name:	Janice Orr	**Job Title:**	Electronic Commerce Card Administrator
Department:	Purchasing	**Reviewer:**	Matt Myers
Date of Hire:	9-29-2009	**Review Period:**	**From:** 1-1-2012 **To:** 12-31-2012

Type of Review: ☐ **Probation (*6 months*)** ☒ **Annual** ☐ **Other**_____

Results Achieved During Review Period

List the goals/expectations for the review period. (If there were no goals set for this review period, check this box ☐.)

Continue to work with Vendors and Buyers to increase participation and spend.

Evaluate how the employee did on achieving those goals during the review period.

Janice has done an exceptional job increasing the spend. Rebate for 2012 is $318,184.37.

Ratings Description for the following Performance Factors	
5 Outstanding	The employee consistently performs far beyond the goals/expectations and makes exceptional contributions.
4 Highly Effective	The employee consistently *exceeds* goals/expectations.
3 Effective	The employee consistently *meets* the goals/expectations.
2 Needs Improvement	The employee does not satisfy the duties and requirements on a consistent basis.
1 Unacceptable	The employee is unable to carry out the duties and responsibilities. Immediate and significant improvement is needed.

Review the employee on the performance factors described below. Place an 'X' in the appropriate box next to the performance factor category to indicate the rating level for each factor. Provide examples to support your conclusions under the comments area.	Outstanding	Highly Effective	Effective	Needs Improvement	Unacceptable
Performance Factors					
1. Job Knowledge			X		
• Demonstrates strong technical/operational knowledge commensurate with time on job. • Keeps abreast of industry developments. Applies knowledge to achieve results. • Seeks opportunities to learn.					
Comments: Janice is very knowledgeable about the E-Card process but needs to develop a more in-depth understanding of general procurement.					
2. Quality of Work		X			
• Work is accurate and meets clients and/or department expectations. • Demonstrates thoroughness and completeness in work responsibilities. • Achieves goals.					
Comments: Janice creates very detailed and accurate reports for the Program.					
3. Productivity			X		
• Effectively organizes and plans work. • Prioritizes work and stays on tasks, making adjustments as new information &/or assignments are introduced. • Produces an appropriate volume of work. • Meets deadlines.					
Comments: In regards to E-Card transactions, Janice has done an outstanding job. However, Janice failed to complete the required E-Card Training for everyone this year. This is required by the Procurement Code. Janice did manage the Computer Electronic Equipment bid during this time.					
4. Initiative			X		
• Demonstrates resourcefulness and originates productive action on assignments. • Motivates self and does not wait to be given an assignment. • Is proactive to offer solutions; has an "I can help" attitude versus an "it's not my job/problem" approach.					
Comments:					
5. Communication			X		
• Communicates clearly and effectively verbally and in writing. • Practices effective listening skills. • Works to enhance working relationships by opening up communication channels.					
Comments: Janice communicates well with County departments and employees.					

Review the employee on the performance factors described below. Place an 'X' in the appropriate box next to the performance factor category to indicate the rating level for each factor. Provide examples to support your conclusions under the comments area.	Outstanding	Highly Effective	Effective	Needs Improvement	Unacceptable
Performance Factors, continued					
6. Judgment/Decision-Making			X		
• Analyzes available information and makes sound, timely decisions. • Accepts responsibility for decisions, and learns from mistakes. • Is creative and develops innovative solutions.					
Comments:					
7. Professionalism/Interpersonal Effectiveness			X		
• Operates in a manner appropriate to the business environment. • Works effectively with others; promotes a cohesive and productive team environment. • Strives for organization effectiveness and team results versus individual gain. • Develops supportive and positive working relationships with clients, colleagues, and vendors. • Manages conflict constructively.					
Comments: Janice operates very professionally with vendors and staff. Must be more assertive toward vendors when problems arise.					
8. Accountability/Dependability				X	
• Meets attendance expectations. • Keeps commitments to others. • Accepts responsibility and accomplishes tasks.					
Comments: Janice has stated numerous times that she is covered up with work but will continually ask for leave. Must learn to multi-task and use her time more effectively.					

Summary of Performance

Reviewer Comments. (Summarize the employee's strengths *and* list the area(s) that the employee needs to work on. Include areas that can either be leveraged for career development or that can limit career advancement.)

Janice has done a good job with the E-Card Program this year. Rebate will be largest since inception of program. She is very good about looking for innovative ways to use program.
Janice must understand her attendance is crucial to the continued growth of the program.

Goals/expectations to be achieved during the upcoming review period

List performance objectives. (Objectives should be specific, realistic, and measurable.) Identify keys to success for achieving each objective. For example, resources, tools or other kinds of support.

Successfully complete the testing for the Certified Purchasing Card Manager program. Goal to be accomplished by June 30, 2013.

Signatures

Employee Comments:

Employee Signature Janice Orr ***Emp. No.*** [redacted] ***Date*** 1/31/2013

(By signing this form, the employee verifies that the performance evaluation discussion has occurred. Signing this form does not indicate that the employee agrees or disagrees with the evaluation.)

Reviewer Signature [signature] ***Emp No.*** [redacted] ***Date*** 1-29-13

2nd Level Reviewer Signature [signature] ***Emp. No.*** [redacted] ***Date*** 1-31-13

Overall Performance Rating

Total Score: 24 **(Add all ratings)**

Average Score: 3 **(Total divided by number of items)**

See attachments.

Employee No. [redacted]

RECEIVED FEB 0 4 2014

Performance Evaluation Form

Employee Information			
Employee Name:	Janice Orr	**Job Title:**	Program Manager/Contract Specialist
Department:	Purchasing	**Reviewer:**	Matt Myers
Date of Hire:	9-29-2009	**Review Period:**	**From:** 1-1-2013 **To:** 12-31-2013

Type of Review: ☐ **Probation (*6 months*)** ☒ **Annual** ☐ **Other**_____

Results Achieved During Review Period

List the goals/expectations for the review period. (If there were no goals set for this review period, check this box ☐.)

Successfully complete the testing for the Certified Purchasing Card Manager program. Goal to be accomplished by June 30, 2013

Evaluate how the employee did on achieving those goals during the review period.

Janice did not complete this goal.

Ratings Description for the following Performance Factors	
5 Outstanding	The employee consistently performs far beyond the goals/expectations and makes exceptional contributions.
4 Highly Effective	The employee consistently *exceeds* goals/expectations.
3 Effective	The employee consistently *meets* the goals/expectations.
2 Needs Improvement	The employee does not satisfy the duties and requirements on a consistent basis.
1 Unacceptable	The employee is unable to carry out the duties and responsibilities. Immediate and significant improvement is needed.

Review the employee on the performance factors described below. Place an 'X' in the appropriate box next to the performance factor category to indicate the rating level for each factor. Provide examples to support your conclusions under the comments area.	Outstanding	Highly Effective	Effective	Needs Improvement	Unacceptable
Performance Factors					
1. Job Knowledge		X			
• Demonstrates strong technical/operational knowledge commensurate with time on job. • Keeps abreast of industry developments. Applies knowledge to achieve results. • Seeks opportunities to learn.					
Comments: Janice has very good knowledge of the E-card Program and is learning the Contracting phase of the Procurement process.					
2. Quality of Work		X			
• Work is accurate and meets clients and/or department expectations. • Demonstrates thoroughness and completeness in work responsibilities. • Achieves goals.					
Comments:					
3. Productivity			X		
• Effectively organizes and plans work. • Prioritizes work and stays on tasks, making adjustments as new information &/or assignments are introduced. • Produces an appropriate volume of work. • Meets deadlines.					
Comments: Janice processes a large volume of E-card transactions.					
4. Initiative		X			
• Demonstrates resourcefulness and originates productive action on assignments. • Motivates self and does not wait to be given an assignment. • Is proactive to offer solutions; has an "I can help" attitude versus an "it's not my job/problem" approach.					
Comments: Janice seeks to broaden the use of the E-card.					
5. Communication		X			
• Communicates clearly and effectively verbally and in writing. • Practices effective listening skills. • Works to enhance working relationships by opening up communication channels.					
Comments: Janice communicates well with County departments and employees.					

Review the employee on the performance factors described below. Place an 'X' in the appropriate box next to the performance factor category to indicate the rating level for each factor. Provide examples to support your conclusions under the comments area.	Outstanding	Highly Effective	Effective	Needs Improvement	Unacceptable
Performance Factors, continued					
6. Judgment/Decision-Making		X			
• Analyzes available information and makes sound, timely decisions. • Accepts responsibility for decisions, and learns from mistakes. • Is creative and develops innovative solutions.					
Comments:					
7. Professionalism/Interpersonal Effectiveness		X			
• Operates in a manner appropriate to the business environment. • Works effectively with others; promotes a cohesive and productive team environment. • Strives for organization effectiveness and team results versus individual gain. • Develops supportive and positive working relationships with clients, colleagues, and vendors. • Manages conflict constructively.					
Comments: Janice operates very professionally with vendors and staff.					
8. Accountability/Dependability			X		
• Meets attendance expectations. • Keeps commitments to others. • Accepts responsibility and accomplishes tasks.					
Comments:					

Summary of Performance

Reviewer Comments: (Summarize the employee's strengths *and* list the area(s) that the employee needs to work on. Include areas that can either be leveraged for career development or that can limit career advancement.)

Janice was able to surpass last years E-card spend. Good job!

Goals/expectations to be achieved during the upcoming review period

List performance objectives: (Objectives should be specific, realistic, and measurable.) Identify keys to success for achieving each objective. For example, resources, tools or other kinds of support.

Janice must complete all E-card training by June 30, 2014. Additionally Janice should successfully complete certification testing for CPPO by December 31, 2014.

Signatures

Employee Comments:

Employee Signature Janice Rue ***Emp. No.*** [redacted] ***Date*** 1/31/14

(By signing this form, the employee verifies that the performance evaluation discussion has occurred. Signing this form does not indicate that the employee agrees or disagrees with the evaluation.)

Reviewer Signature [signature] ***Emp No.*** [redacted] ***Date*** 2-3-14

2nd Level Reviewer Signature [signature] ***Emp. No.*** [redacted] ***Date*** 2-4-14

Overall Performance Rating

Total Score: 31 **(Add all ratings)**

Average Score: 3.88 **(Total divided by number of items)**

TO: Personnel File

FROM: Janice Orr

RE: Response to Performance Review, Attachment

DATE: January 31, 2013

Accomplishments: I strongly believe with these below accomplishments that I should have received a higher performance review.

2012 E-Commerce
Goal - $302,197
Actual - $318,184.37
Soft Savings $1,922,451.50

Purchasing $6,254,506.86
Soft Savings $134,796.96

Implemented seven "Decline Balance Credit Cards" for the Bookkeepers for the Schools to enhance visibility of spend and eliminate petty cash funds. Also, this will capture dollars from the Schools Activity Fund to turn in to rebate dollars for the County.

I met with Regions, Bank of America, US Bank and American Express to review other purchasing card programs and software.

Initiated SunTrust to review the existing Knox County contract. These reviews lead to an increase of basis points from 135 basis points to 170 basis points. Which lead Knox County receiving to $318,000. Also lead to an increase in Visa Large Ticket basis points from 35 basis points to 50 basis points.

Implemented the "Weekly payment" schedule to maximize the rebate revenue with assistance of the Trustee's Office and Director of Financial Systems and Compliance. This was a great success.

Computer and Electronic Bid was a 6 month project. The bid consist of 166 line items with 13 vendors bidding. I believe that the evaluation of the bid was put together in a very professional manner. The bid was protested by a vendor. These protests lead to a response from Director of Purchasing, Sr. Director of Finance and Mayor Tim Burchett and found without merit. This vendor also attended Commission meetings and Audit Committee's and found without merit.

This was the first time I had written a bid. I will admit I was very cautious with communication with the vendors either awarded or not awarded. I had not received any formal training in the procurement field at the time but felt confident that I had adequate experience and exposure to be able to successfully complete the task assigned. I am positive with time I will gain my confidence with the support of management.

In 2012, I took 8 3/4 vacation days. That was approved by management. Comments made in our Buyer meetings are on Monday that gives me 4 days to work toward getting my job done and prepare for the day that I have requested off. I need to engage my supervisor more in regards to my work load and job responsibilities.

I am very good at multi-tasking my job responsibilities or I would be unable to do my job. I believe my supervisor's opinion of my abilities to perform is blemished due to misunderstanding or miscommunication of my responsibilities/ workload. I will continue to work closer with my supervisor to engage him on the details of my job.

Annual Training was not completed in 2012 per the procurement code. Internal Audit noted a finding that "We noted that cardholders have not attended re-training since May 2010, because it has not been scheduled since that time. Lack of Training increases the risk of inappropriate purchases and payments".

Training for 2012 began in late October and will complete in February. I agree that training should be completed within the calendar year; however, due to excessive workload and personnel transfer during that period resulted in a delay. Training individual departments instead of large group settings are providing much more qualitative feedback.

In 2012, Knox County's card program was recognized by Visa Government Solutions in the magazine Visa Exchange for excellence in card program oversight and utilization.

Knox County earned the largest public sector rebate in the Southeastern United States among SunTrust clients.

Knox County rate of compliance /fraud rates for 2012

Compliance Rate 99.98% / Fraud Rate 00.02%

Knox County

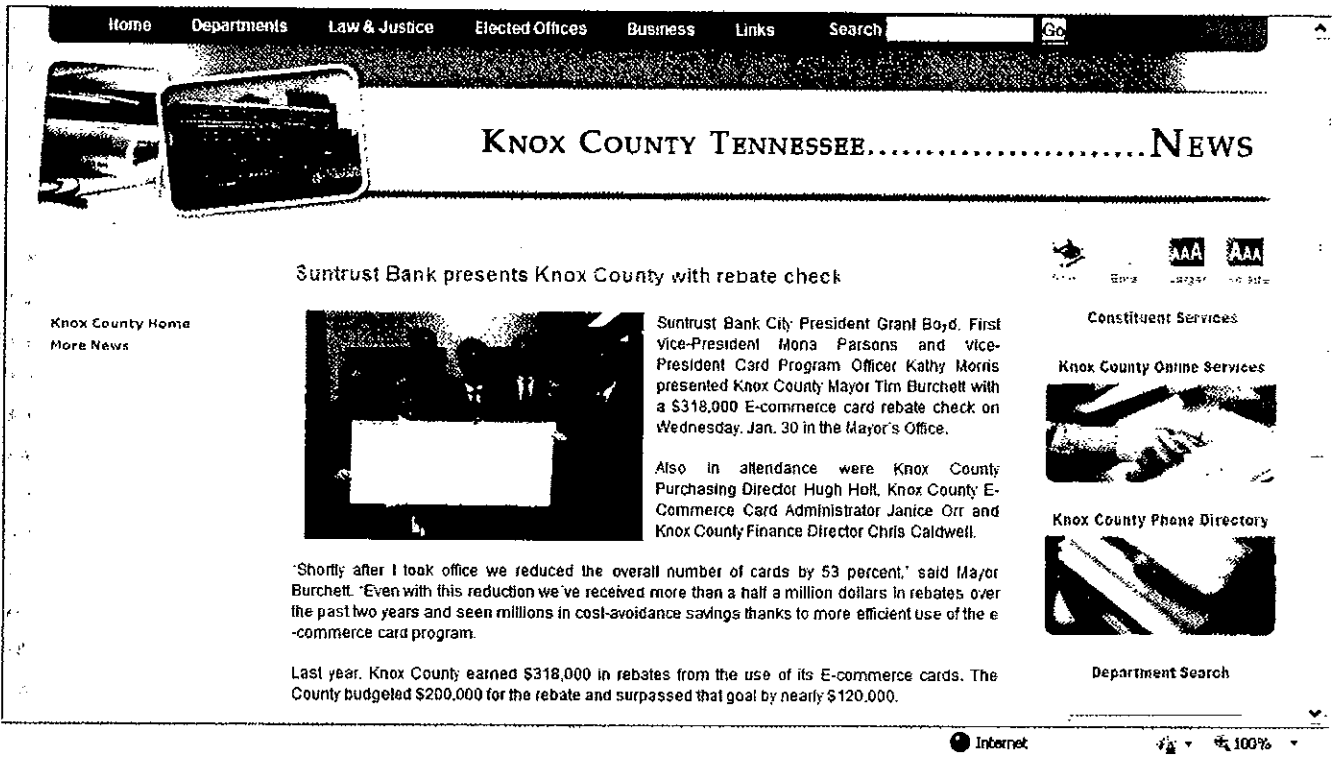
2012 Projected Rebate Calculation New Schedule B (Jan-Jun monthly payment & Jul-Dec weekly payment)

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
PCard	$ 1,413,643	$ 1,274,608	$ 2,019,668	$ 1,312,902	$ 1,535,173	$ 1,833,249	$ 1,553,616	$ 1,623,421	$ 2,571,452	$ 1,681,970	$ 1,681,970	$ 1,681,970	$ 20,183,641
VLT*	$88,343	$82,903	$384,154	$93,148	$54,688	$367,585	$62,500	$159,261	$182,849	$182,849	$182,849	$182,849	$ 2,023,978
Net Spend	$ 1,325,300	$ 1,191,705	$ 1,635,514	$ 1,219,754	$ 1,480,485	$ 1,465,664	$ 1,491,115	$ 1,464,160	$ 2,388,603	$ 1,499,121	$ 1,499,121	$ 1,499,121	$ 18,159,663
Standard BPS	0.015	0.015	0.015	0.015	0.015	0.015	0.017	0.017	0.017	0.017	0.017	0.017	
VLT Rebate	0.005	0.005	0.005	0.005	0.005	0.005	0.005	0.005	0.005	0.005	0.005	0.005	
Rebate	$ 20,321	$ 18,290	$ 26,453	$ 18,762	$ 22,481	$ 23,823	$ 25,661	$ 25,687	$ 41,520	$ 26,399	$ 26,399	$ 26,399	$ 302,197

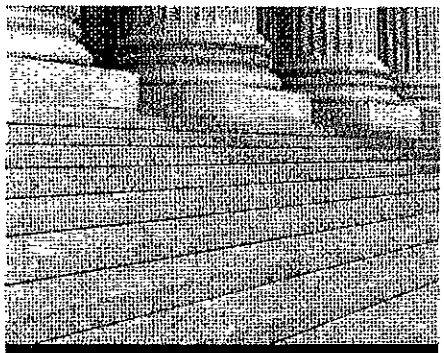
Emp #	Last Name	First Name	Type Descr	From Date	To Date	Earned	Used	Run Bal
[redacted]	ORR	JANICE	VACATION	1/14/2012	1/27/2012	4.304	0	25.332
[redacted]	ORR	JANICE	VACATION	1/28/2012	2/10/2012	4.304	0	29.636
[redacted]	ORR	JANICE	VACATION	2/11/2012	2/24/2012	0	8	21.636
[redacted]	ORR	JANICE	VACATION	2/11/2012	2/24/2012	4.304	0	25.94
[redacted]	ORR	JANICE	VACATION	2/25/2012	3/9/2012	4.304	0	30.244
[redacted]	ORR	JANICE	VACATION	3/10/2012	3/23/2012	0	6	24.244
[redacted]	ORR	JANICE	VACATION	3/10/2012	3/23/2012	4.304	0	28.548
[redacted]	ORR	JANICE	VACATION	3/24/2012	4/6/2012	0	8	20.548
[redacted]	ORR	JANICE	VACATION	3/24/2012	4/6/2012	4.304	0	24.852
[redacted]	ORR	JANICE	VACATION	4/7/2012	4/20/2012	4.304	0	29.156
[redacted]	ORR	JANICE	VACATION	4/21/2012	5/4/2012	4.304	0	33.46
[redacted]	ORR	JANICE	VACATION	5/5/2012	5/18/2012	4.304	0	37.764
[redacted]	ORR	JANICE	VACATION	5/19/2012	6/1/2012	4.304	0	42.068
[redacted]	ORR	JANICE	VACATION	6/2/2012	6/15/2012	4.304	0	46.372
[redacted]	ORR	JANICE	VACATION	6/16/2012	6/29/2012	4.304	0	50.676
[redacted]	ORR	JANICE	VACATION	6/30/2012	7/13/2012	0	16	34.676
[redacted]	ORR	JANICE	VACATION	6/30/2012	7/13/2012	4.304	0	38.98
[redacted]	ORR	JANICE	VACATION	6/30/2012	7/13/2012	40	0	78.98
[redacted]	ORR	JANICE	VACATION	7/14/2012	7/27/2012	4.304	0	83.284
[redacted]	ORR	JANICE	VACATION	7/28/2012	8/10/2012	4.304	0	87.588
[redacted]	ORR	JANICE	VACATION	8/11/2012	8/24/2012	4.304	0	91.892
[redacted]	ORR	JANICE	VACATION	8/25/2012	9/7/2012	0	16	75.892
[redacted]	ORR	JANICE	VACATION	8/25/2012	9/7/2012	4.304	0	80.196
[redacted]	ORR	JANICE	VACATION	9/8/2012	9/21/2012	0	1.25	78.946
[redacted]	ORR	JANICE	VACATION	9/8/2012	9/21/2012	4.304	0	83.25
[redacted]	ORR	JANICE	VACATION	9/22/2012	10/5/2012	4.616	0	87.866
[redacted]	ORR	JANICE	VACATION	10/6/2012	10/19/2012	0	8	79.866
[redacted]	ORR	JANICE	VACATION	10/6/2012	10/19/2012	4.616	0	84.482
[redacted]	ORR	JANICE	VACATION	10/20/2012	11/2/2012	4.616	0	89.098
[redacted]	ORR	JANICE	VACATION	11/3/2012	11/16/2012	0	8	81.098
[redacted]	ORR	JANICE	VACATION	11/3/2012	11/16/2012	4.616	0	85.714
[redacted]	ORR	JANICE	VACATION	11/17/2012	11/30/2012	4.616	0	90.33
[redacted]	ORR	JANICE	VACATION	12/1/2012	12/14/2012	4.616	0	94.946
[redacted]	ORR	JANICE	VACATION	12/15/2012	12/28/2012	4.616	0	99.562
[redacted]	ORR	JANICE	VACATION	12/29/2012	1/11/2013	4.616	0	104.178
						154.4	71.25	

8 3/4 quarters of vacation in 2012

It's on the main page
Lori Holmann
Sent: Wednesday, January 30, 2013 3:07 PM
To: Janice Orr



Lori Holmann
Knox County Government-Purchasing Department
Lori.holmann@knoxcounty.org
Phone: 865-215-5757 Fax: 865-215-5779



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Stay informed with the latest news for the public sector

Oversight maximizes county's card program efficiency and savings

For state and local government, it's not enough to be good stewards of the budget. Today, governments are required to spend more wisely while cutting costs and improving the functionality of the procurement process. For Knox County, Tenn., key to achieving those goals is fast, accurate procurement spending data.

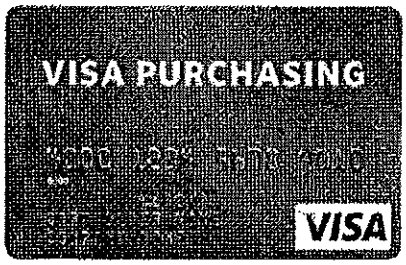
Operating under the Knox County Procurement Code, the purchasing division is responsible for supply management, maintaining centralized procurement and supervising all services purchased and/or leased for the county. The county's Visa Purchase card program, established in 2001, today includes more than 170 cardholders who spend $16 million annually. Keeping an eye on that purchasing activity is critical.

"We want to make sure all our cardholders are maximizing use of the card, but using it appropriately," says Janice Orr, procurement card administrator for Knox County. "We also want to make sure our taxpayers are able to clearly see that we are making responsible purchases." To accommodate these goals, Orr makes maximum use of the program's spend data application provided by their issuer, in order to track every transaction made with the purchase cards. That data has made it easier to encourage cardholder compliance. "It keeps our card program aligned with our policies with an electronic transaction audit trail so we can monitor card use and detect any fraud and misuse," says Orr.

continued on page 3 ...

Transaction and authorization control review

Well-conceived transaction and authorization controls are a critical component of a healthy purchasing card program. These controls help reduce exposure to risk because they enhance control and accountability and ensure cardholder compliance with your purchasing policies.



Following are examples of typical transaction and authorization controls:

Merchant Category Code (MCC)
Merchants are assigned a category code, referred to as an MCC, based on the type(s) of goods and services they provide. MCCs can be "blocked," which restricts the cardholder from making a purchase at any merchant with a blocked MCC. Examples of MCCs that you may elect to block include jewelry, department and grocery stores, and dating and escort services.

Care must be taken so that legitimate government suppliers are not blocked. Current suppliers should be analyzed to find the MCCs in which they are categorized so that those MCCs remain unblocked. Some organizations maintain MCC watch lists, which show transactions occurring at merchants within specific MCCs that the organizations are considering blocking. This can be a good intermediate step while it is determined whether there is a valid business reason for keeping the MCCs unblocked.

Cash Back/ATM Restriction
This restriction denies cardholders the ability to get cash back during a transaction or to withdraw cash from an ATM.

Single Transaction Limit
This limits the dollar amount a cardholder can spend on a single transaction.

Billing Cycle Spend Limit
This limits the total dollar amount a cardholder can spend during a billing cycle.

Transaction Frequency Limit
This control limits the number of transactions a cardholder can make during a set period of time (24 hours, seven days, or a billing cycle).

Oversight maximizes county's card program efficiency and savings

continued from page 1...

With an increase in card use – spending has increased by $6.3 million during Orr's two-plus year tenure – automated data reconciliation has become particularly important. The county's purchase card data is consolidated and receipts are reconciled in coordination with their enterprise resource planning system. This functionality delivers tailored reporting to management, which, in turn, helps the county better negotiate vendor contracts.

"It's key to utilize your financial management system in conjunction with your Visa Purchase card program," Orr says. "For example, we use the spending data from the customized reports for strategic sourcing to negotiate supplier and volume discounts."

In addition to monitoring spending behavior through a strong compliance and reporting management tool, Orr also believes that an efficient, accountable and transparent Visa Purchase card program is achieved through keen oversight. The county's program makes sure cardholders are trained in person, where those responsible for making purchases on behalf of the county receive clear instruction on responsibilities of appropriate spending. Those in-person sessions also provide the card program with insight from the end users, which helps her fine-tune the program.

"We will continue to grow our purchase card program by maximizing spend opportunities and streamlining our communication and training while maintaining control," says Orr.

For more information on Visa Government Purchase cards for your state, contact Darren Muise at dmuise@visa.com

About the Knox County card program:

Number of cards:

173

Monthly spend:

$1.6 million

Year program was established:

2001

Numbers are current as of July 2012.

Employee No. [redacted]

FEB 0 2 2015

Performance Evaluation Form

Employee Information			
Employee Name:	Janice Orr	**Job Title:**	Program Mgr/Contract Specialist
Department:	Purchasing	**Reviewer:**	Matt Myers
Date of Hire:	Sep 29, 2009	**Review Period:**	**From:** 1/14 **To:** 12/14

Type of Review: ☐ **Probation (*6 months*)** ☒ **Annual** ☐ **Other**_____

Results Achieved During Review Period

List the goals/expectations for the review period. (If there were no goals set for this review period, check this box ☐.)

Successfully complete the testing for the Certified Purchasing Card Manager program.

Evaluate how the employee did on achieving those goals during the review period.

This goal was not completed.

Ratings Description for the following Performance Factors

5 Outstanding	The employee consistently performs far beyond the goals/expectations and makes exceptional contributions.
4 Highly Effective	The employee consistently *exceeds* goals/expectations.
3 Effective	The employee consistently *meets* the goals/expectations.
2 Needs Improvement	The employee does not satisfy the duties and requirements on a consistent basis.
1 Unacceptable	The employee is unable to carry out the duties and responsibilities. Immediate and significant improvement is needed.

Review the employee on the performance factors described below. Place an 'X' in the appropriate box next to the performance factor category to indicate the rating level for each factor. Provide examples to support your conclusions under the comments area.	Outstanding	Highly Effective	Effective	Needs Improvement	Unacceptable
Performance Factors					
1. Job Knowledge		X			
• Demonstrates strong technical/operational knowledge commensurate with time on job. • Keeps abreast of industry developments. Applies knowledge to achieve results. • Seeks opportunities to learn.					
Comments: Janice is continuing to learn the Buying aspect associated with her position. Has dealt effectively with several acquisitions that she has uncovered.					
2. Quality of Work		X			
• Work is accurate and meets clients and/or department expectations. • Demonstrates thoroughness and completeness in work responsibilities. • Achieves goals.					
Comments:					
3. Productivity		X			
• Effectively organizes and plans work. • Prioritizes work and stays on tasks, making adjustments as new information &/or assignments are introduced. • Produces an appropriate volume of work. • Meets deadlines.					
Comments: E-card transactions have continued to increase, therefore increasing our year end rebate.					
4. Initiative		X			
• Demonstrates resourcefulness and originates productive action on assignments. • Motivates self and does not wait to be given an assignment. • Is proactive to offer solutions; has an "I can help" attitude versus an "it's not my job/problem" approach.					
Comments: Janice has taken on a couple of large solicitations, as well as helped develope the Tax Processing Solutions.					
5. Communication		X			
• Communicates clearly and effectively verbally and in writing. • Practices effective listening skills. • Works to enhance working relationships by opening up communication channels.					
Comments:					

Review the employee on the performance factors described below. Place an 'X' in the appropriate box next to the performance factor category to indicate the rating level for each factor. Provide examples to support your conclusions under the comments area.	Outstanding	Highly Effective	Effective	Needs Improvement	Unacceptable
Performance Factors, continued					
6. Judgment/Decision-Making		X			
• Analyzes available information and makes sound, timely decisions. • Accepts responsibility for decisions, and learns from mistakes. • Is creative and develops innovative solutions.					
Comments: Janice is wiling to ask for help when in doubt.					
7. Professionalism/Interpersonal Effectiveness		X			
• Operates in a manner appropriate to the business environment. • Works effectively with others; promotes a cohesive and productive team environment. • Strives for organization effectiveness and team results versus individual gain. • Develops supportive and positive working relationships with clients, colleagues, and vendors. • Manages conflict constructively.					
Comments:					
8. Accountability/Dependability			X		
• Meets attendance expectations. • Keeps commitments to others. • Accepts responsibility and accomplishes tasks.					
Comments: Janice needs to make sure that the E-card office is staffed during business hours.					

Summary of Performance

Reviewer Comments. (Summarize the employee's strengths *and* list the area(s) that the employee needs to work on. Include areas that can either be leveraged for career development or that can limit career advancement.)

Janice has done a good job with the E-Card spend this year. Additionally, has worked well with the IT personnel to better streamline the purchasing function.

GOOD JOB JANICE!

Goals/expectations to be achieved during the upcoming review period

List performance objectives. (Objectives should be specific, realistic, and measurable.). Identify keys to success for achieving each objective. For example, resources, tools or other kinds of support.

1.
2. Develop a Strategic Procurement Plan for her associated departments.

Signatures

Employee Comments:

Employee Signature Janice Orr ***Emp. No.*** [redacted] ***Date*** 1/28/15

(By signing this form, the employee verifies that the performance evaluation discussion has occurred. Signing this form does not indicate that the employee agrees or disagrees with the evaluation.)

Reviewer Signature [signature] ***Emp No.*** [redacted] ***Date*** 1-28-15

2nd Level Reviewer Signature H. G. Holt ***Emp. No.*** [redacted] ***Date*** 2-2-15

Overall Performance Rating

Total Score: 31 **(Add all ratings)**

Average Score: 3.88 **(Total divided by number of items)**

Employee No. [redacted]

Performance Evaluation Form

Employee Information			
Employee Name:	Janice Orr	Job Title:	Program Mgr/Contract Specialis
Department:	Purchasing	Reviewer:	Matt Myers
Date of Hire:	9/29/2009	Review Period:	From: 1/2015 To: 12/2015

Type of Review: ☐ Probation (*6 months*) ☑ Annual ☐ Other_____

Results Achieved During Review Period

List the goals/expectations for the review period. (If there were no goals set for this review period, check this box ☐.)

Develop a Strategic Procurement Plan for her associated departments.

Evaluate how the employee did on achieving those goals during the review period.

This goal was completed.

Ratings Description for the following Performance Factors	
5 Outstanding	The employee consistently performs far beyond the goals/expectations and makes exceptional contributions.
4 Highly Effective	The employee consistently *exceeds* goals/expectations.
3 Effective	The employee consistently *meets* the goals/expectations.
2 Needs Improvement	The employee does not satisfy the duties and requirements on a consistent basis.
1 Unacceptable	The employee is unable to carry out the duties and responsibilities. Immediate and significant improvement is needed.

Review the employee on the performance factors described below. Enter the number (1-5) in the appropriate box next to the performance factor category to indicate the rating level for each factor. Provide examples to support your conclusions under the comments area.	Outstanding	Highly Effective	Effective	Needs Improvement	Unacceptable
Performance Factors					
1. Job Knowledge				2	
• Demonstrates strong technical/operational knowledge commensurate with time on job. • Keeps abreast of industry developments. Applies knowledge to achieve results. • Seeks opportunities to learn.					
Comments: Janice has yet to achieve a professional certification as required by her Job Description.					
2. Quality of Work			3		
• Work is accurate and meets clients and/or department expectations. • Demonstrates thoroughness and completeness in work responsibilities. • Achieves goals.					
Comments:					
3. Productivity		4			
• Effectively organizes and plans work. • Prioritizes work and stays on tasks, making adjustments as new information &/or assignments are introduced. • Produces an appropriate volume of work. • Meets deadlines.					
Comments: Janice processes an ever-increasing amount of transactions.					
4. Initiative			3		
• Demonstrates resourcefulness and originates productive action on assignments. • Motivates self and does not wait to be given an assignment. • Is proactive to offer solutions; has an "I can help" attitude versus an "it's not my job/problem" approach.					
Comments:					
5. Communication			3		
• Communicates clearly and effectively verbally and in writing. • Practices effective listening skills. • Works to enhance working relationships by opening up communication channels.					
Comments:					

Review the employee on the performance factors described below. Place an 'X' in the appropriate box next to the performance factor category to indicate the rating level for each factor. Provide examples to support your conclusions under the comments area.	Outstanding	Highly Effective	Effective	Needs Improvement	Unacceptable
Performance Factors, continued					
6. Judgment/Decision-Making			3		
• Analyzes available information and makes sound, timely decisions. • Accepts responsibility for decisions, and learns from mistakes. • Is creative and develops innovative solutions.					
Comments:					
7. Professionalism/Interpersonal Effectiveness				2	
• Operates in a manner appropriate to the business environment. • Works effectively with others; promotes a cohesive and productive team environment. • Strives for organization effectiveness and team results versus individual gain. • Develops supportive and positive working relationships with clients, colleagues, and vendors. • Manages conflict constructively.					
Comments: Janice appears bored and uninterested in the bi-weekly meetings with the Buying staff.					
8. Accountability/Dependability			3		
• Meets attendance expectations. • Keeps commitments to others. • Accepts responsibility and accomplishes tasks.					
Comments: Janice needs to be more committed to being at work.					

Summary of Performance

Reviewer Comments. (Summarize the employee's strengths *and* list the area(s) that the employee needs to work on. Include areas that can either be leveraged for career development or that can limit career advancement.)

Janice needs to concentrate on her specific function within the organization and not insert herself into situations not associated to her work.

Goals/expectations to be achieved during the upcoming review period

List performance objectives. (Objectives should be specific, realistic, and measurable.). Identify keys to success for achieving each objective. For example, resources, tools or other kinds of support.

Successfully complete the testing for the Certified Purchasing Card Manager program.

Signatures

Employee Comments:

Employee Signature _____ ***Emp. No.*** [redacted] ***Date*** _____

(By signing this form, the employee verifies that the performance evaluation discussion has occurred. Signing this form does not indicate that the employee agrees or disagrees with the evaluation.)

Reviewer Signature _____ ***Emp No.*** [redacted] ***Date*** _____

2nd Level Reviewer Signature _____ ***Emp. No.*** [redacted] ***Date*** _____

Overall Performance Rating

Total Score: 23 (Add all ratings)

Average Score: 2.9 (Total divided by number of items)

Employee No. [redacted]

RECEIVED FEB 0 1 2016

Performance Evaluation Form

Employee Information			
Employee Name:	Janice Orr	Job Title:	Program Mgr/Contract Specialis
Department:	Purchasing	Reviewer:	Matt Myers
Date of Hire:	9/29/2009	Review Period:	From: 1/2015 To: 12/2015

Type of Review: ☐ Probation (*6 months*) ☑ Annual ☐ Other_____

Results Achieved During Review Period

List the goals/expectations for the review period. (If there were no goals set for this review period, check this box ☐.)

Develop a Strategic Procurement Plan for her associated departments.

Evaluate how the employee did on achieving those goals during the review period.

This goal was completed.

Ratings Description for the following Performance Factors	
5 Outstanding	The employee consistently performs far beyond the goals/expectations and makes exceptional contributions.
4 Highly Effective	The employee consistently *exceeds* goals/expectations.
3 Effective	The employee consistently *meets* the goals/expectations.
2 Needs Improvement	The employee does not satisfy the duties and requirements on a consistent basis.
1 Unacceptable	The employee is unable to carry out the duties and responsibilities. Immediate and significant improvement is needed.

Review the employee on the performance factors described below. Enter the number (1-5) in the appropriate box next to the performance factor category to indicate the rating level for each factor. Provide examples to support your conclusions under the comments area.	Outstanding	Highly Effective	Effective	Needs Improvement	Unacceptable
Performance Factors			3		
1. Job Knowledge • Demonstrates strong technical/operational knowledge commensurate with time on job. • Keeps abreast of industry developments. Applies knowledge to achieve results. • Seeks opportunities to learn. ***Comments:*** Janice has yet to achieve a professional certification as required by her Job Description.			3		
2. Quality of Work • Work is accurate and meets clients and/or department expectations. • Demonstrates thoroughness and completeness in work responsibilities. • Achieves goals. ***Comments:***		4			
3. Productivity • Effectively organizes and plans work. • Prioritizes work and stays on tasks, making adjustments as new information &/or assignments are introduced. • Produces an appropriate volume of work. • Meets deadlines. ***Comments:*** Janice processes an ever-increasing amount of transactions.		4			
4. Initiative • Demonstrates resourcefulness and originates productive action on assignments. • Motivates self and does not wait to be given an assignment. • Is proactive to offer solutions; has an "I can help" attitude versus an "it's not my job/problem" approach. ***Comments:***			3		
5. Communication • Communicates clearly and effectively verbally and in writing. • Practices effective listening skills. • Works to enhance working relationships by opening up communication channels. ***Comments:***					

Review the employee on the performance factors described below. Place an 'X' in the appropriate box next to the performance factor category to indicate the rating level for each factor. Provide examples to support your conclusions under the comments area.	Outstanding	Highly Effective	Effective	Needs Improvement	Unacceptable
Performance Factors, continued					
6. Judgment/Decision-Making			3		
• Analyzes available information and makes sound, timely decisions. • Accepts responsibility for decisions, and learns from mistakes. • Is creative and develops innovative solutions.					
Comments:					
7. Professionalism/Interpersonal Effectiveness			3		
• Operates in a manner appropriate to the business environment. • Works effectively with others; promotes a cohesive and productive team environment. • Strives for organization effectiveness and team results versus individual gain. • Develops supportive and positive working relationships with clients, colleagues, and vendors. • Manages conflict constructively.					
Comments: Janice would benefit from additional interaction of the bi-weekly meetings with the professional Buying Staff.					
8. Accountability/Dependability			3		
• Meets attendance expectations. • Keeps commitments to others. • Accepts responsibility and accomplishes tasks.					
Comments: Janice needs to be sure that someone is available in the office during business hours to handle card issues that may arise.					

Summary of Performance

Reviewer Comments. (Summarize the employee's strengths *and* list the area(s) that the employee needs to work on. Include areas that can either be leveraged for career development or that can limit career advancement.)

Janice needs to concentrate on her specific function within the organization and not let outside distractions disrupt her work priorities.

Goals/expectations to be achieved during the upcoming review period

List performance objectives. (Objectives should be specific, realistic, and measurable.). Identify keys to success for achieving each objective. For example, resources, tools or other kinds of support.

Successfully complete the testing for the Certified Professional Procurement Officer (CPPO).

Signatures

Employee Comments:

* **Employee Signature** _____ **Emp. No.** [redacted] **Date** _____

(By signing this form, the employee verifies that the performance evaluation discussion has occurred. Signing this form does not indicate that the employee agrees or disagrees with the evaluation.)

Reviewer Signature _____ **Emp No.** [redacted] **Date** 2-1-16

2nd Level Reviewer Signature _____ **Emp. No.** [redacted] **Date** 2-1-16

Overall Performance Rating

Total Score: 26 **(Add all ratings)**

Average Score: 3.3 **(Total divided by number of items)**

* EMPLOYEE WOULD NOT SIGN.