



City of Santa Fe New Mexico

Finance Department

Memorandum



DATE: March 14, 2018

TO:

FROM: Renee Martinez, Deputy City Manager
Adam K. Johnson, Finance Director
Lynette Trujillo, HR Director

ISSUE: Project ¡Ándale! Functional Lead Memorandum of Expectation

This memorandum is to officially explain my expectations regarding your professional interaction with co-workers, vendors, consultants, other City representatives and all other personnel that you engage in as part of your duties as a Functional Lead for the City of Santa Fe's ERP system implementation project known as Project ¡Ándale!. This letter should not be considered or perceived by you or others as discipline. This memorandum will serve to document my expectations, your responsibilities, and what is considered appropriate. **In order to memorialize these expectations I will place a copy of this letter in your personnel file.**

My expectations for you are as follows:

- **Leadership/Decision Making:** I believe the best leaders have the professional courage to take risk and make decisions. There is always an element of uncertainty resulting from lack of perfect knowledge and there will always be an element of risk taking in decision making. You are ***required*** to make the decisions asked of you. Wrong decisions, when made with the best of intentions will ***never*** have negative consequences.
- **Resourcefulness:** A resourceful leader can adapt well to new or difficult situations and is able to think creatively. I expect you to be resourceful. I expect you to provide your best attempt at a solution when you are in need of assistance and guidance. I expect you to provide your best attempt at an answer when you present with questions.
- **Training:** You will be operating in a current and future state concurrently during this implementation process. You can expect training to run in tandem with decision making responsibilities. You are expected to be fully present and engaged during these training opportunities – both formal and informal. Please take notes, refer to the procedures, conduct research if necessary, and ask questions.
- **Working Relations:** You are to conduct yourself with professionalism and respect at all times. Display courtesy and cooperativeness at all times toward others when carrying out your duties. Your interactions with others must be collegial and help create a positive work environment.
- **Voicemail:** Listen to your voicemails immediately and carefully. Determine whether there is follow-up or action or response required, and respond accordingly. You are encouraged to show initiative and be responsive to all communications.



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- **E-mail:** Read your emails as soon as possible. Determine whether a follow-up or a response is necessary, and respond accordingly. You may need to acknowledge receipt or give status, even if you do not know the answer, but are working on it. You may receive electronic meeting requests. Please respond quickly since it advises the sender immediately that you are confirmed for the time and place. You are encouraged to show good written etiquette, initiative, be proactive and responsive in all your electronic communications.
- **Communication:** You must always communicate in a clear, honest, and timely manner. If you are unclear on any assignment, or if you have completed one task and are ready for additional work, you are strongly encouraged to show initiative and contact me. Eliminate the habit of having others seek you out to find out the status of your work. That responsibility is up to you.
- **Meeting Participation:** When you are asked to attend a meeting, please make every effort to be there on time. Respect your time commitments and those of others. Do not expect participants to locate you when you are not there. If you will be delayed or need to reschedule, contact the participants as soon as possible to explain the delay, give estimated time of delay or reschedule.
- **Deadlines:** Please follow-through with set deadlines. If you experience a delay in meeting your commitment, consult with me before the deadline to give a status update, obtain further direction, or to set a new deadline if possible. Otherwise, it is my expectation that you will make all of the necessary arrangements to meet the agreed deadline. Also, do not wait for someone to come looking for your work product, it is your responsibility to be proactive and turn it in on time.
- **Accuracy:** When you are given a work assignment, task or project, please review and proofread your work very carefully for format, accuracy, grammar, tone, and purpose **prior** to turning it in. Be your own editor and strive to turn in quality work at all times. Therefore, you should strive to be *“Brief, Clear, and Concise.”* While some of your work may be checked and edited, please do not rely on anyone else to proof your work.
- **Directives or Directions:** Functional Leads are required to comply with the Executive Steering Committee, Project Management Team, Change Management Team, Vendor and Consultants’ request, instructions or directives. In the event you are unable to meet this standard, you should consult me immediately to discuss any problems, delays, and/or challenges. I must be able to rely on you to carry out your role responsibilities and give you feedback if there are any problems. While there may be times you do not agree with the decisions, requests or directives, I encourage you to discuss your concerns with us, but ultimately you are responsible for complying.
- **Conflict Management:** It is normal for differences of opinion or conflicts to occur in the work place. When this happens, it is my expectation that you will work towards an amicable solution, and be mindful not to escalate the situation. Please strive to establish good working relations at all times.



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As a Functional Lead for Project ¡Ándale!, I am committed to seeing you succeed. Please keep this list close by and reference it as often as you need. The Executive Steering Committee, Project Management Team and Change Management Team will assist and support your efforts towards meeting these expectations. I am confident that you will accept this letter as an effort to improve your performance. I am also confident that you will make all necessary efforts to improve your performance. Please contact me if you have questions about the content of this letter.

Sincerely,

Adam K. Johnson
Finance Department Director

Lynette Trujillo
Human Resource Director

RECEIVED:

Employee Name (Print)

Employee Signature

Date