

Diaz, Bethany

From: Maya, Autumn
Sent: Friday, October 09, 2015 9:51 AM
To: Perkovich, Mark
Subject: Emailing: PHX-#4327502-v1-SIS-Sensitive_High_Profile_Cases___Confidential___
Attachments: PHX-#4327502-v1-SIS-Sensitive_High_Profile_Cases___Confidential___XLSX

Your message is ready to be sent with the following file or link attachments:

PHX-#4327502-v1-SIS-Sensitive_High_Profile_Cases___Confidential___

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Diaz, Bethany

From: Maya, Autumn
Sent: Friday, October 09, 2015 11:12 AM
Subject: Weekly Intel Brief
Attachments: WIB 10-9-2015.docx

Todd Parenteau

Special Agent



Office of the Attorney General – SIS
1275 W. Washington, Phoenix, AZ 85007
Desk: 602.542.4974 | Cell: 602.316.3271 | Fax: 602.542.4882
todd.parenteau@azag.gov
<http://www.azag.gov>

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Diaz, Bethany

From: Maya, Autumn
Sent: Monday, October 19, 2015 8:13 AM
Subject: WIB 10-16-2015
Attachments: WIB 10-16-2015.docx

Diaz, Bethany

From: Maya, Autumn
Sent: Monday, October 19, 2015 8:13 AM
Subject: WIB 10-16-2015
Attachments: WIB 10-16-2015.docx

Diaz, Bethany

From: Maya, Autumn
Sent: Monday, November 02, 2015 9:19 AM
Subject: Weekly Intelligence Brief 10-30-2015
Attachments: WIB 10-30-2015.docx

Here is the intelligence brief for this week!

Kyle Kowalski

Diaz, Bethany

From: Maya, Autumn
Sent: Friday, November 06, 2015 3:30 PM
Subject: Weekly Intelligence Brief 11-6-2015
Attachments: WIB 11-6-2015.docx

Diaz, Bethany

From: Maya, Autumn
Sent: Friday, November 13, 2015 4:47 PM
To: DL-SIS-ALL
Subject: Weekly Intelligence Brief 11-13-2015
Attachments: WIB 11-13-2015.docx

Here is the intelligence brief for this week!

Have a good weekend,

Kyle Kowalski

Diaz, Bethany

From: Maya, Autumn
Sent: Wednesday, November 25, 2015 2:16 PM
To: DL-SIS-ALL
Subject: Weekly Intelligence Brief 11-20-2015
Attachments: WIB 11-20-2015.docx

Diaz, Bethany

From: Maya, Autumn
Sent: Tuesday, December 01, 2015 12:43 PM
To: DL-SIS-ALL
Subject: WIB 11-27-2015
Attachments: WIB 11-27-2015.docx

Here is the Weekly Intel Brief for last week.

Kyle

Diaz, Bethany

From: Maya, Autumn
Sent: Monday, December 14, 2015 9:27 AM
To: DL-SIS-ALL
Subject: WIB 12-11-2015
Attachments: WIB 12-11-2015.docx

Here is the intelligence brief for this week.

Kyle

Diaz, Bethany

From: Maya, Autumn
Sent: Friday, October 09, 2015 10:53 AM
Subject: EMV Overview - A Guide For Law Enforcement
Attachments: EMV Overview A Guide for Law Enforcement 10 01 15.pdf PDF FINAL.PDF

NGISG Members,

I received the attached guide from the USSS on the new EMV cards. Sending it in the event your agency may find it useful.

Kylie M. Dickneite
Gaming Intelligence Analyst, CICA
Missouri Gaming Commission
Phone: 573-526-6830
Email: Kylie.Dickneite@mshp.dps.mo.gov

Notice This e-mail message (including any file attachments transmitted with it) is for the sole use of the intended recipient(s) and may contain confidential and legally privileged information. Any unauthorized use or disclosure of this e-mail by an unintended recipient is prohibited. If you have received this e-mail in error, please notify the sender by return e-mail and destroy all copies of the original message. No representation is made that this e-mail or any attachments are free of viruses. Virus scanning recommended and is the responsibility of the recipient.

Diaz, Bethany

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Sent: Friday, October 09, 2015 10:53 AM
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Kylie M. Dickneite
Gaming Intelligence Analyst, CICA
Missouri Gaming Commission
Phone: 573-526-6830
Email: Kylie.Dickneite@mshp.dps.mo.gov

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Sent: Friday, October 09, 2015 10:53 AM
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I received the attached guide from the USSS on the new EMV cards. Sending it in the event your agency may find it useful.

Kylie M. Dickneite
Gaming Intelligence Analyst, CICA
Missouri Gaming Commission
Phone: 573-526-6830
Email: Kylie.Dickneite@mshp.dps.mo.gov

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Diaz, Bethany

From: Maya, Autumn
Sent: Wednesday, November 04, 2015 11:02 AM
To: Rodriguez, Lisa
Subject: PHX-#4750631-v1-SAG0603-ADMIN_II_Interview_Questions
Attachments: PHX-#4750631-v1-SAG0603-ADMIN_II_Interview_Questions.doc

Please review and edit/add.

Thanks

**QUESTIONS FOR
ADMINISTRATIVE ASSISTANT II
INTERVIEW**

INTERVIEWEE: _____ INTERVIEWER: _____

Date: _____

INTRODUCTION:

A. Introduce everyone present at the interview.

B. Describe the Section and Position.

Position No. SAG0603
Salary: \$25,507.00 - \$34,035.00

QUESTIONS:

1. Are you aware this position is **Uncovered**?

Have you reviewed the Knowledge, Skills and Abilities for this position? YES NO
Do you have any questions?

2. Have you had a chance to review the job requirements for this position? YES NO
Do you have any questions?

3. Do you have a valid Arizona Driver's License? YES NO

4. Are you aware that travel is required for this position? YES NO
Do you have any questions?

5. Have you applied and/or interviewed for any other opportunities within the Attorney General's Office?

6. What interests you about this position?

7. If selected for this position, what unique skill set would you bring to the Arizona Attorney General's Office and the Special Investigations Unit?

9. You will be required to maintain internal SIS case tracking reports and obtain Case File numbers. What specific job duties have you had that qualify you for this position?

10. You will be required to draft purchasing requisitions and travel packets. Please tell the panel your experience related to these two functions and your knowledge of the State of Arizona ADOA and Arizona Attorney General's Office policies governing these functions?

11. This is a hypothetical question:

- Your supervisor is out of the office and unavailable for contact.
- The Section Chief approaches you to prepare an up to date report, *and* he needs it right away.
- This is a report that you have seen lots of times but have only had brief work experience with.
- In other words, you have not done the report on your own without supervision.
- How would you handle the request?

12. Please tell the panel about:
- A. Your experience dealing with a high volume workload.
 - B. How do you work under deadlines or pressure?
 - C. Your experience dealing with a past boss that was _____
[bossy/passive/high-maintenance]

13. The ability to solve problems is a necessary skill for this position. Describe a situation when you were faced with a problem at work. What was the problem and how did you solve it?

14. This position requires independent work. Please give us examples of projects and assignments where you demonstrated this ability on a regular basis?

15. Is there anything pertaining to your work experience that was not already covered that you would like to add?

DESCRIPTION OF BENEFITS

Benefit Brochure e-mailed to all candidates.

CONCLUSION

A. Explain the fingerprinting and background process.

B. When are you available to begin work?

C. Have you provided **three** references with current contact information? YES NO

D. Do you have any questions?

Diaz, Bethany

From: Maya, Autumn
Sent: Friday, December 18, 2015 2:11 PM
To: DL-SIS-ALL
Subject: CRM Brady Policy - Updated 12/17/15
Attachments: Untitled.PDF - Adobe Acrobat Pro.pdf

Please see attached.

Autumn Maya
Law Enforcement Administrator



Office of the Attorney General – SIS
1275 W. Washington, Phoenix, AZ 85007
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Autumn.Maya@azag.gov
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OFFICE OF ATTORNEY GENERAL

CRIMINAL DIVISION

MEMORANDUM

TO: All CRM Attorneys, Paralegals and Investigative Personnel

FROM: Donald E. Conrad
Criminal Division Chief Counsel

DATE: December 17, 2015

RE: *BRADY/GIGLIO* PROTOCOL RE: POTENTIAL IMPEACHMENT INFORMATION RELATING TO LAW ENFORCEMENT AGENCY EMPLOYEES

In order to provide consistency in the manner of compliance with our duties imposed pursuant to Brady/Giglio (Brady), this protocol has been drafted. This protocol replaces the Criminal Division's previous protocol found at document #71039-v4, last revised on August 19, 2013. All prosecutors within the Criminal Division of the Office of the Attorney General are instructed to implement this protocol in all criminal prosecutions.

I. Review and Retention of Brady Material by the Office of the Attorney General:

When information becomes available to any prosecutor related to conduct by a law enforcement officer that may invoke a disclosure requirement pursuant to Brady, the prosecutor in possession of that material should bring the information to the attention of his/her Section Chief who is responsible for presenting the same to the Brady Review Committee (Committee). The Committee is composed of the Criminal Division Chief and the Section Chiefs of the Criminal Division. The Committee is chaired by the Criminal Division Chief.

Upon receipt of information that appears to be Brady impeachment material, the Committee shall supplement the information available by requesting any additional information it deems necessary from any relevant police agency or from other sources that may provide information that may assist the Committee in deciding if a Brady disclosure obligation exists.

If after a review of any relevant materials and information the Committee finds that a Brady obligation exists, the material upon which the Committee has based its decision shall be provided to the Division's supervising Office Administrator. It is the responsibility of the supervising Office Administrator to image and file the relevant materials in the HDM public folder entitled "CRM- BRADY/GIGLIO INFO."

II. Identification of Brady/Giglio Information Available at Time of Charging:

To the extent that Brady information is known to a trial prosecutor prior to the time of making the initial disclosures to the defense pursuant to Rule 15, Rules of Criminal Procedure, the prosecutor assigned to the prosecution shall include within the Rule 15 written disclosure statement the notice set out below. In each prosecution, prosecutors shall check the "CRM-BRADY/GIGLIO INFO" file to identify law enforcement witnesses in a case for whom a Brady entry has been created in the HDM public folder. If, based on information available to the prosecutor, Brady material is identified, prosecutors shall include the following notice to the defense:

Materials that may be a required disclosure pursuant to *Brady v Maryland*, 373 U.S. 83 (1983) are available for inspection upon request.

III. Identification of Brady/Giglio After Filing of Initial Rule 15 Disclosure:

For cases in which a plea offer is extended, the assigned trial prosecutor shall within 30 days of the rejection of a plea offer, or a failure to accept a plea offer by a stated deadline, make a written request for Brady material to any law enforcement agency that employs or has previously employed witnesses in the case who are or have been law enforcement agents. In cases for which the prosecutor has made a decision to extend no plea offer, the written request for Brady material shall be made within 30 days of the decision to not make a plea offer. In either case, the request shall be made utilizing Attachment 1 to this protocol. To the extent that materials responsive to the prosecutor's written requests may be considered Brady materials, they should be submitted to the Committee and, if deemed to be subject to mandatory disclosure by the Committee, a supplemental Rule 15 written disclosure must be made making the materials available for inspection. Disclosure to the defense should be made in the same manner as in an initial Rule 15 disclosure. Prior to making a written request for Brady material, the trial prosecutor shall make reasonable efforts to identify all prior places of employment of law enforcement agents identified as witnesses in order to be comprehensive in making inquiries about the existence of Brady material that must be disclosed.

IV. Protocol Regarding Release of Copies of Brady Materials:

Due to the sensitive nature of the contents of materials disclosed pursuant to Brady, the AGO policy will be to make materials available for inspection by the defense but not to provide copies of the materials. If defense counsel desires a copy, the assigned prosecutor shall file a Motion for a Protective Order limiting the distribution of the Brady material to the defense lawyer and the defendant.

V. Referral of Brady related Information to Law Enforcement Agencies:

Should any prosecutor within the Criminal Division observe or become aware of conduct by or information about a law enforcement officer that may constitute Brady impeachment material, the prosecutor shall make known the specifics of the conduct in question or shall provide the specific information to his/her Section Chief.

If the prosecutor determines that material in his/her possession *could* be construed as Brady material but that a legitimate argument may be made that the material is not Brady and the material is sensitive, damaging to the career of the law enforcement officer, objectionably invasive of the privacy of a law enforcement officer, irrelevant, or otherwise inappropriate for disclosure, the prosecutor shall, with the agreement of his/her Section Chief, file a motion for *in camera* review of the materials prior to any disclosure.

VI. Electronic Storage of *Brady-Giglio* Information:

Information received by the Attorney General's Office pursuant to this protocol and determined by the Committee to be Brady material will be stored and retained in accordance with these procedures. *Brady-Giglio* information will only be stored and retained on the authority of the Criminal Division Chief Counsel or designee, if any. Criminal Division attorneys, paralegals and legal secretaries will not be permitted to store and retain *Brady-Giglio* records, unless they have been so designated by the Criminal Division Chief Counsel.

The storage and retention of *Brady-Giglio* information will be made in the Public Folder named: "CRM – BRADY/GIGLIO INFO." Within the CRM – BRADY/GIGLIO INFO folder are sub-folders with agency names. The appropriate agency-named folder will be selected, and information concerning the affected law enforcement agency employee will be placed in an appropriately named sub-folder within the agency folder.

It will be the responsibility of the person storing the information to ensure that the proper agency folder has been selected or in the case of information received for an agency not yet listed, the responsibility will include the creation of a new agency folder. The name for the employee folder will be in the format, "Last Name, First Initial and Serial Number". (For example, "FRIDAY J 12345.") Information that contains the officer's last name, first initial and agency serial number will be sufficient to identify that officer to the exclusion of all others that may be contained in other employee folders within the same agency folder.

Upon first receipt of *Brady-Giglio* information, it will be the responsibility of the person storing the information to make an indexing entry in the "BRADY-GIGLIO MASTER LIST." This file is an EXCEL spreadsheet that is to be used as a quick reference list when searching for *Brady-Giglio* information. This EXCEL spreadsheet is located in the Public Folder named "CRM – BRADY/GIGLIO INFO."

Information that must be entered in the BRADY-GIGLIO MASTER LIST includes:

- Agency
- Last Name
- First Name
- Middle Name
- Serial Number
- Court Case Number
- AGO Case Number
- Prosecutor

The Public Folder named "CRM – BRADY/GIGLIO INFO" including all sub-folders and files contained therein will be maintained with "READ ONLY" permissions for CRM Division employees. Only the CRM Division Chief and CRM Section Chiefs, if so designated by the Criminal Division Chief Counsel, and their respective designees, if any, will be given "READ-WRITE" permissions to these folders and files.

VII. Procedure for Removing Information from the *Brady/Giglio* Records:

The Brady Committee shall have the authority to remove information from the *Brady/Giglio* records if it determines by a 2/3 majority vote of the members in attendance at a meeting, provided a quorum exists, that the reason for placing the officer in the *Brady/Giglio* records is no longer accurate or necessary, or for any other reason that it deems is a satisfactory basis to justify removal. The review can be initiated at the request of a Committee member, by the affected law enforcement officer or by the affected law enforcement officer's agency. It is at the discretion of the Committee whether a request will be heard or voted upon. If the Committee votes to remove the records, the Criminal Division Chief Counsel or designee shall be responsible for removal of such information from the *Brady/Giglio* records.

cc: Mike Bailey, Chief Deputy Attorney General
John Lopez, Solicitor General
Lisa Rodriguez, Criminal Division Office Administrator

ATTACHMENT 1

[DATE]

[NAME & ADDRESS]

Re: *State v. [DEFENDANT]*, CR [CASE NO.]

Dear [ADDRESSEE]:

This office represents the State in the above-named case, which is set for trial on [TRIAL DATE] before Judge [JUDGE'S NAME] in [COURT NAME]. Pursuant to our obligations under *Brady v. Maryland*, 373 U.S. 83 (1963) and *Giglio v. United States*, 405 U.S. 150 (1972), we request a review of your agency files for potential impeachment information regarding the following employees, who are expected to testify in the above-named case:

1. [NAME]
2. [NAME]

For your assistance in reviewing these records, the defendant has been charged with [OFFENSES] in violation of [STATUTES]. This case involves [BRIEF OVERVIEW OF CASE, EXPLAINING ABOVE-NAMED EMPLOYEES' INVOLVEMENT].

As you know, the *Brady/Giglio* line of cases requires that the government disclose material information that may be helpful to the defense, including information that affects the credibility of government witnesses. Accordingly, please review the personnel and related administrative files of the above-named employees for information showing any bias, prejudice, coercive behavior, lack of credibility, dishonesty or other material impeachment evidence and any disciplinary sanctions imposed on the above witness(es) based on any of the aforementioned activity. Following the review, please mail, e-mail or fax a written response to the undersigned no later than two weeks before the trial date, even if the review yields no *Brady/Giglio* information.

Thank you for your assistance. If you have any questions, please call.

Sincerely,
[TRIAL PROSECUTOR]
Assistant Attorney General
Criminal Division

Diaz, Bethany

From: Maya, Autumn
Sent: Tuesday, December 22, 2015 4:34 PM
To: Martinez, Gilda; O'Shea, Peggy
Cc: Giltner, Cynthia; Jaquez, Elvira; Rodriguez, Lisa; Shabi, Shaylin
Subject: RE: New [REDACTED] e new case...

I have not seen the COS yet. I will research tomorrow morning.

From: Martinez, Gilda
Sent: Tuesday, December 22, 2015 4:32 PM
To: Maya, Autumn; O'Shea, Peggy
Cc: Giltner, Cynthia; Jaquez, Elvira; Rodriguez, Lisa; Shabi, Shaylin
Subject: RE: New [REDACTED] new case...

What is the status of the SIS opening for the new [REDACTED] case

From: Martinez, Gilda
Sent: Friday, December 18, 2015 12:50 PM
To: Maya, Autumn; O'Shea, Peggy
Cc: Giltner, Cynthia; Jaquez, Elvira; Rodriguez, Lisa (Lisa.Rodriguez@azag.gov)
Subject: New [REDACTED] new case...

Peggy as I mentioned earlier, you (SIS) will need to open a new case in LF and submit a new case opening for the new [REDACTED] case.

I have initiated the case in LF it is P0022015002156, I have copied Autumn. If you ladies have any questions see me.
Thanks

Diaz, Bethany

From: Maya, Autumn
Sent: Wednesday, December 23, 2015 8:16 AM
To: Martinez, Gilda; O'Shea, Peggy
Cc: Giltner, Cynthia; Jaquez, Elvira; Rodriguez, Lisa; Shabi, Shaylin
Subject: RE: New [REDACTED] new case...

This case will be processed today.

From: Martinez, Gilda
Sent: Tuesday, December 22, 2015 4:32 PM
To: Maya, Autumn; O'Shea, Peggy
Cc: Giltner, Cynthia; Jaquez, Elvira; Rodriguez, Lisa; Shabi, Shaylin
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Thanks

Diaz, Bethany

From: Maya, Autumn
Sent: Tuesday, December 29, 2015 4:48 PM
To: Rodriguez, Lisa
Subject: I stopped working at 4:30. Good night!

Autumn Maya
Law Enforcement Administrator



Office of the Attorney General – SIS
1275 W. Washington, Phoenix, AZ 85007
Desk: 602.542.7903 | Cell: 602.284.9297 | Fax: 602.542.4882
Autumn.Maya@azag.gov
<http://www.azag.gov>

Diaz, Bethany

From: Maya, Autumn
Sent: Tuesday, December 29, 2015 9:01 AM
To: Rodriguez, Lisa
Subject: RE: FORM-AGENT OVERTIME

Great, thank you...

From: Rodriguez, Lisa
Sent: Tuesday, December 29, 2015 8:44 AM
To: Maya, Autumn
Subject: RE: FORM-AGENT OVERTIME

Autumn – I like this updated form better. I think it will really help you, but you must ensure everyone is using the form you put in place once it is ready. See my attached comments. I didn't want to mess up your form, so I made changes attached. Also, I added the distribution on the bottom which helps explain the process. If you don't think that is needed, don't add it. Call me if you have questions. If you can't read this and want the original I wrote on, I will bring it over. Great job! Lisa

From: Maya, Autumn
Sent: Thursday, December 24, 2015 3:13 PM
To: Rodriguez, Lisa
Subject: FORM-AGENT OVERTIME

THOUGHTS?

Autumn Maya
Law Enforcement Administrator



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Autumn.Maya@azag.gov
<http://www.azag.gov>

Diaz, Bethany

From: Maya, Autumn
Sent: Tuesday, December 29, 2015 8:27 AM
To: Rodriguez, Lisa
Subject: RE: SIS tablets

Ok sounds good...I think Jim Connell is still imaging the one Dan had but once he is done I will return it to you for assignment.

Thanks

From: Rodriguez, Lisa
Sent: Tuesday, December 29, 2015 8:21 AM
To: Maya, Autumn
Cc: Rodriguez, Lisa
Subject: FW: SIS tablets

These are the people with the tablets. You need to keep it with you inventory. Also, I'll give SIS one less from my inventory as you have Woods to give out now. You can return it to me for distribution. Let me know if that works. Thanks. Lisa

From: Holtkamp, Ken
Sent: Monday, December 28, 2015 4:00 PM
To: Rodriguez, Lisa
Subject: SIS tablets

Thank you!

Ken Holtkamp
Technical Services Manager



Office of the Attorney General
Information Services Section
1275 W. Washington
Phoenix, AZ 85007
Desk: 602.542.8061
Ken.Holtkamp@azag.gov

Diaz, Bethany

From: Maya, Autumn
Sent: Tuesday, December 29, 2015 7:59 AM
To: Rodriguez, Lisa
Subject: I'm here

Diaz, Bethany

From: Maya, Autumn
Sent: Tuesday, December 29, 2015 7:51 AM
To: Rodriguez, Lisa
Cc: Perkovich, Mark
Subject: RE: ETE - This week ...

Will do. Thanks for the help ☺

From: Rodriguez, Lisa
Sent: Monday, December 28, 2015 6:03 PM
To: Maya, Autumn
Cc: Perkovich, Mark
Subject: ETE - This week ...

Autumn – Please remind SIS that ETEs are due on Weds at noon due to the Friday holiday. Since you will be out, I will help you, but please ensure that Katie, Shaylin and the Special Agent Supervisors get me all leave slips and OT slips by Thursday at 10am. Have a great time off! Thanks! Lisa

Lisa Rodriguez
Legal Administrator
Arizona Attorney General's Office
Criminal Division
(602) 542-8488
lisa.rodriquez@azag.gov

Diaz, Bethany

From: Maya, Autumn
Sent: Monday, December 28, 2015 4:34 PM
To: Rodriguez, Lisa
Subject: I'm leaving. Good night!

Autumn Maya
Law Enforcement Administrator



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Desk: 602.542.7903 | Cell: 602.284.9297 | Fax: 602.542.4882
Autumn.Maya@azag.gov
<http://www.azag.gov>

Diaz, Bethany

From: Maya, Autumn
Sent: Monday, December 28, 2015 2:20 PM
To: Rodriguez, Lisa
Cc: Gee, Kay; Verver, Phillip; Human Resources
Subject: RE: SAG0984 - CRM/SIS - Transfer of SA Peggy O'Shea

She is in cube 1091C.

Thanks

From: Rodriguez, Lisa
Sent: Monday, December 28, 2015 2:17 PM
To: Gee, Kay
Cc: Verver, Phillip; Human Resources; Rodriguez, Lisa; Maya, Autumn
Subject: RE: SAG0984 - CRM/SIS - Transfer of SA Peggy O'Shea
Importance: High

No. She has moved downstairs. Autumn – Please indicate the room number for Kay. Thanks! Lisa

From: Gee, Kay
Sent: Thursday, December 24, 2015 10:27 AM
To: Rodriguez, Lisa
Cc: Verver, Phillip; Human Resources
Subject: RE: SAG0984 - CRM/SIS - Transfer of SA Peggy O'Shea

Updates made in HRIS, you should see changes on Monday. Will she stay in her current office location?

Thank you,

Kay Gee
Human Resources Section



Attorney General Mark Brnovich
1275 W. Washington, Phoenix, AZ 85007
Desk: 602-364-0680
kay.gee@azag.gov

From: Rodriguez, Lisa
Sent: Wednesday, December 23, 2015 10:10 AM
To: Welch, Leslie; Gee, Kay; Human Resources
Cc: Rodriguez, Lisa; Verver, Phillip
Subject: SAG0984 - CRM/SIS - Transfer of SA Peggy O'Shea

Leslie/Kay – Please see the attached Memo transferring SA O'Shea from one SIS Unit to another effective December 21, 2015. Also attached is her fillable PDQ. Her funding will also change from IGAB30368 to GFAE30032. I will bring the original documents to HR. Thanks. Lisa

Phil – FYI.

Lisa Rodriguez

Legal Administrator
Arizona Attorney General's Office
Criminal Division
(602) 542-8488
lisa.rodriguez@azag.gov

Diaz, Bethany

From: Maya, Autumn
Sent: Monday, December 28, 2015 9:54 AM
To: Rodriguez, Lisa
Subject: I'm here

Autumn Maya
Law Enforcement Administrator



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Autumn.Maya@azag.gov
<http://www.azag.gov>

Diaz, Bethany

From: Maya, Autumn
Sent: Thursday, December 24, 2015 4:32 PM
To: Rodriguez, Lisa
Subject: I'm leaving now.

Autumn Maya
Law Enforcement Administrator



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1275 W. Washington, Phoenix, AZ 85007
Desk: 602.542.7903 | Cell: 602.284.9297 | Fax: 602.542.4882
Autumn.Maya@azag.gov
<http://www.azag.gov>

Diaz, Bethany

From: Maya, Autumn
Sent: Thursday, December 24, 2015 4:15 PM
To: Rodriguez, Lisa
Subject: Monday 11/28/15 request to come in late.

Hi Lisa;

So sorry I forgot that my doctor scheduled me for Monday to come in at 8:20 for a follow-up appointment.

I will be in right after and will turn in a leave slip.

Hope you are having a blast.

Thanks

Autumn Maya
Law Enforcement Administrator



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Desk: 602.542.7903 | Cell: 602.284.9297 | Fax: 602.542.4882
Autumn.Maya@azag.gov
<http://www.azag.gov>

Diaz, Bethany

From: Maya, Autumn
Sent: Thursday, December 24, 2015 1:52 PM
To: Gee, Kay
Cc: Human Resources; Rodriguez, Lisa
Subject: RE: Ronald Baroldy

Great, thank you

From: Gee, Kay
Sent: Thursday, December 24, 2015 1:39 PM
To: Maya, Autumn
Cc: Human Resources; Rodriguez, Lisa
Subject: RE: Ronald Baroldy

I spoke with Ronald, he needs to discuss with his HR dept before accepting with a start date of 01/04/2016. He will call me back on Monday with a start date.

From: Maya, Autumn
Sent: Thursday, December 24, 2015 1:37 PM
To: Gee, Kay
Subject: RE: Ronald Baroldy

April would handle it ☺

Thank you

From: Gee, Kay
Sent: Thursday, December 24, 2015 1:30 PM
To: Maya, Autumn
Cc: Human Resources; Rodriguez, Lisa
Subject: RE: Ronald Baroldy

Autumn,

I cannot remember if SIS notifies the other candidates interviewed they were not selected or is that something April would send for you?

From: Maya, Autumn
Sent: Thursday, December 24, 2015 11:30 AM
To: Gee, Kay
Subject: RE: Ronald Baroldy

Thank you Kay.

Merry Christmas

From: Gee, Kay
Sent: Thursday, December 24, 2015 9:11 AM
To: Maya, Autumn

Cc: Perkovich, Mark; Edwards, Michael; Rodriguez, Lisa; Human Resources
Subject: RE: Ronald Baroldy

Autumn,

The next start date I have is 01/04/2016, I will contact him and let him know, in addition to sending him the additional HR paperwork.

Thank you,

Kay Gee
Human Resources Section



Attorney General Mark Brnovich
1275 W. Washington, Phoenix, AZ 85007
Desk: 602-364-0680
kay.gee@azag.gov

From: Maya, Autumn
Sent: Wednesday, December 23, 2015 2:59 PM
To: Gee, Kay
Cc: Perkovich, Mark; Edwards, Michael
Subject: RE: Ronald Baroldy

Hi Kay;

Ronald Baroldy can start as soon as possible and does not need a two week buffer.

Thank you

From: Maya, Autumn
Sent: Wednesday, December 23, 2015 10:15 AM
To: Gee, Kay
Cc: Perkovich, Mark; Edwards, Michael; Watola, Donald
Subject: Ronald Baroldy

Good morning;

The above candidate has successfully completed the background process and can officially be offered the position.

Thank you

Autumn Maya
Law Enforcement Administrator



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<http://www.azag.gov>

Diaz, Bethany

From: Maya, Autumn
Sent: Thursday, December 24, 2015 9:06 AM
To: Accounting
Cc: Rodriguez, Lisa; Perkovich, Mark
Subject: RE: Polar Leasing LTE Increase

The 120 appeal period started Dec 11, 2015. So we need to be able to cover at least three months more, perhaps four.

From: Accounting
Sent: Wednesday, December 23, 2015 2:03 PM
To: Maya, Autumn
Cc: Rodriguez, Lisa
Subject: Polar Leasing LTE Increase
Importance: High

Hi ladies,

The LTE for Polar Leasing was originally encumbered for \$25,000 and is almost out of funds. Can I get authorization to increase the LTE further?

Each month's amount has been \$5,772.09, and the LTE currently is short \$9,632.54 (\$1,911.64 remaining in the LTE) to pay the November and December invoices we have also received.

Assuming you will be using this vendor through the end of the FY in June, can I please get an increase in the amount of \$44,265.08? This will cover the current outstanding amount (\$9,632.54) and the rest of the fiscal year (\$5,772.09 * 6) assuming the price doesn't change.

Please let me know if you have any questions.

Thank you,

Accounting - TE



Attorney General Mark Brnovich
1275 W. Washington, Phoenix, AZ 85007
Phone: 602-542-4349 | Fax: 602-542-5940
Accounting@azag.gov
<http://www.azag.gov>

Diaz, Bethany

From: Maya, Autumn
Sent: Thursday, December 24, 2015 7:59 AM
To: Rodriguez, Lisa
Subject: I'm here.

Autumn Maya

Law Enforcement Administrator



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<http://www.azag.gov>

Diaz, Bethany

From: Maya, Autumn
Sent: Wednesday, December 23, 2015 4:58 PM
To: Rodriguez, Lisa
Subject: I'm leaving now. Good night.

Autumn Maya
Law Enforcement Administrator



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<http://www.azag.gov>

Diaz, Bethany

From: Maya, Autumn
Sent: Wednesday, December 23, 2015 2:39 PM
To: Accounting
Cc: Rodriguez, Lisa
Subject: RE: Polar Leasing LTE Increase

I am checking to see how much longer we need and will get back with you as soon as I can.

From: Accounting
Sent: Wednesday, December 23, 2015 2:03 PM
To: Maya, Autumn
Cc: Rodriguez, Lisa
Subject: Polar Leasing LTE Increase
Importance: High

Hi ladies,

The LTE for Polar Leasing was originally encumbered for \$25,000 and is almost out of funds. Can I get authorization to increase the LTE further?

Each month's amount has been \$5,772.09, and the LTE currently is short \$9,632.54 (\$1,911.64 remaining in the LTE) to pay the November and December invoices we have also received.

Assuming you will be using this vendor through the end of the FY in June, can I please get an increase in the amount of \$44,265.08? This will cover the current outstanding amount (\$9,632.54) and the rest of the fiscal year (\$5,772.09 * 6) assuming the price doesn't change.

Please let me know if you have any questions.

Thank you,

Accounting - TE



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<http://www.azag.gov>

Diaz, Bethany

From: Maya, Autumn
Sent: Wednesday, December 23, 2015 11:15 AM
To: Rodriguez, Lisa
Subject: RE: PHX-#1918-v2-FORM_-_AGENT_OVERTIME

k

From: Rodriguez, Lisa
Sent: Wednesday, December 23, 2015 11:12 AM
To: Maya, Autumn
Subject: RE: PHX-#1918-v2-FORM_-_AGENT_OVERTIME

I have this to discuss with you as well today, if we have time. Again, this form needs to be edited in the actual SIS form. The same read only instructions apply to this as well.

From: Maya, Autumn
Sent: Monday, December 21, 2015 3:30 PM
To: Rodriguez, Lisa
Subject: PHX-#1918-v2-FORM_-_AGENT_OVERTIME

Edits?

Thanks

Diaz, Bethany

From: Maya, Autumn
Sent: Wednesday, December 23, 2015 11:13 AM
To: Rodriguez, Lisa
Subject: RE: HCFA Case Openings

Oh wow ok did not know that about the read only. I was clicking on profile and it was grayed out and I couldn't make any changes.

Sounds good

From: Rodriguez, Lisa
Sent: Wednesday, December 23, 2015 11:10 AM
To: Maya, Autumn
Subject: RE: HCFA Case Openings

You are able to edit the old ones when you take the document out of read only status. To do this, you right click on the document ... and click remove read only – make the changes ... and then right click on the document again ... and click make read only. It is important to stay consistent and to lock your forms down so that no one can make changes to it but you or me, if necessary. My suggestion is that I will delete HCFA/FRS COS that are in your public folder and you need to add the two latest forms to the public folder and make them read only. For example, this is the same way I did it when we edited the regular SIS COS when we made the edits. Let's talk about this today and I can show you again.

From: Maya, Autumn
Sent: Wednesday, December 23, 2015 11:02 AM
To: Rodriguez, Lisa
Subject: RE: HCFA Case Openings

Yes FRS was fixed as well #4823523. Sorry those are no good. I am unable to edit those forms so I made new ones and emailed them to the Supervisor's

From: Rodriguez, Lisa
Sent: Wednesday, December 23, 2015 10:47 AM
To: Maya, Autumn
Subject: RE: HCFA Case Openings

What about FRS? You need to change these forms as these are the master. Or, am I missing something and a whole new form was created and these are obsolete? Either way, we need the right forms in the right place.

From: Maya, Autumn
Sent: Wednesday, December 23, 2015 10:43 AM
To: Rodriguez, Lisa
Subject: RE: HCFA Case Openings

I spoke to Schwegel and McClain Monday about it so we should be good now.

From: Rodriguez, Lisa
Sent: Wednesday, December 23, 2015 10:42 AM
To: Maya, Autumn
Subject: HCFA Case Openings

Hey there. HCFA is not using the updated COS that Don Conrad wanted addressing Senior 60+ and Vulnerable as attached. As we discussed previously when I updated the main SIS COS and drafted the procedures for SIS, FRU and HCFA have their own SIS COS forms in PHX Public Folder/SIS Forms. They must be updated asap. Please ensure these forms are updated by December 29th and inform those SIS agents in those Units. If you have any questions, please see me. Thanks. Lisa

Lisa Rodriguez
Legal Administrator
Arizona Attorney General's Office
Criminal Division
(602) 542-8488
lisa.rodriquez@azag.gov

Diaz, Bethany

From: Maya, Autumn
Sent: Wednesday, December 23, 2015 8:13 AM
To: Martinez, Gilda
Cc: Rodriguez, Lisa
Subject: RE: P-2015-2145

Thanks I will remind them.

From: Martinez, Gilda
Sent: Tuesday, December 22, 2015 5:28 PM
To: Maya, Autumn
Cc: Rodriguez, Lisa; Maya, Autumn
Subject: RE: P-2015-2145

Not sure who opened this case, however the box under "For Official Use Only" containing conflict check, created name cards, etc. is not completed.

It is important that your staff check off the boxes and ensure they add their initials as confirmation that all that was completed. My staff is responsible for completing conflict checks for all non SIS cases and I have instructed them that it is not necessary to complete a conflict check for SIS cases because your staff takes care of it. Please let me know if you have questions. Thanks

From: Shabi, Shaylin
Sent: Tuesday, December 22, 2015 4:35 PM
To: MacDonald, Madison
Cc: Martinez, Gilda; Eckert, Robert
Subject: P-2015-2145

Hello,

The attached case has been approved, please view attachment.

Thank you,

Shaylin Shabi

Administrative Assistant III



Office of the Attorney General – SIS
1275 W. Washington, Phoenix, AZ 85007
Desk: 602.542.7909 | Cell: 602.363.2239
Fax: 602.542.4882
shaylin.shabi@azag.gov

Diaz, Bethany

From: Maya, Autumn
Sent: Wednesday, December 23, 2015 8:11 AM
To: Rodriguez, Lisa
Subject: I need to go to the warehouse with Charlie around 11 is that ok?

Autumn Maya
Law Enforcement Administrator



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Autumn.Maya@azag.gov
<http://www.azag.gov>

Diaz, Bethany

From: Maya, Autumn
Sent: Wednesday, December 23, 2015 7:58 AM
To: Rodriguez, Lisa
Subject: I'm here.

Autumn Maya
Law Enforcement Administrator



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<http://www.azag.gov>

Diaz, Bethany

From: Maya, Autumn
Sent: Tuesday, December 22, 2015 4:36 PM
To: Rodriguez, Lisa
Subject: I am leaving. Good night!!!

Autumn Maya
Law Enforcement Administrator



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<http://www.azag.gov>

Diaz, Bethany

From: Maya, Autumn
Sent: Tuesday, December 22, 2015 4:30 PM
To: Quintana, Leah; Rodriguez, Lisa
Subject: RE: Voyager Card List

Great, thanks

From: Quintana, Leah
Sent: Tuesday, December 22, 2015 4:19 PM
To: Rodriguez, Lisa; Maya, Autumn
Subject: RE: Voyager Card List

Hi Lisa and Autumn,

The employee's name is not actually listed on the card so she won't need a new card – I can just update our internal log with this information ☺

Thank you,

Leah Quintana
Accountant III



Attorney General Mark Brnovich
1275 W. Washington, Phoenix, AZ 85007
Phone: 602-542-8446 | Fax: 602-542-5940
Leah.Quintana@azag.gov
<http://www.azag.gov>

From: Rodriguez, Lisa
Sent: Tuesday, December 22, 2015 3:43 PM
To: Maya, Autumn
Cc: Quintana, Leah
Subject: RE: Voyager Card List

Is it changed on the Credit Card issued or does it remain the same? Probably need to get a new card so the records match.

From: Maya, Autumn
Sent: Tuesday, December 22, 2015 3:39 PM
To: Rodriguez, Lisa
Cc: Quintana, Leah
Subject: RE: Voyager Card List

The list is correct just changed last name of Scozzari to O'Shea.

Thanks

From: Quintana, Leah
Sent: Tuesday, December 22, 2015 2:59 PM
To: Rodriguez, Lisa

Cc: McCombs, Joshua
Subject: Voyager Card List

Hi Lisa,

Here is the current list of Voyager Card assignments. I want to make sure my current list is correct. Can you please look through this list and let me know if there are any updates? Thanks! ☺

<u>Card Number</u>	<u>Employee's Name</u>
	OPP, MELISSA
	LOFTUS, CHARLIE
	GRIFFITTS, FRANK
	McCLAIN, MARK
	BUHROW, LAUREN
	MAYA, AUTUMN
	NUSBAUM, ROGER
	PARENTEAU, TODD
	MADSEN, ANNALISA
	SCOZZARI, PEGGY-PEGGY O'SHEA
	ALI, DILSHER
	ORTIZ, DANIEL-
	ARVIZU, FRANCISCO
	DAVIES, GEORGIA
	CUNNINGHAM, SCOTT
	WILLIAMS, TRAVIS
	ECKERT, ROBERT
	MacDONALD, MADISON
	LOOMIS, BUDDY
	ACOSTA, DANYA
	EDWARDS, MICHAEL
	SPENCER, KEVIN
	CUELLAR, PAUL
	STEVENS, JOHN

Thank you,

Leah Quintana
Accountant III



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1275 W. Washington, Phoenix, AZ 85007
Phone: 602-542-8446 | Fax: 602-542-5940
Leah.Quintana@azag.gov
<http://www.azag.gov>

Diaz, Bethany

From: Maya, Autumn
Sent: Tuesday, December 22, 2015 3:30 PM
To: Rodriguez, Lisa
Subject: RE: Voyager Card List

I will check the list and get back with you

From: Rodriguez, Lisa
Sent: Tuesday, December 22, 2015 3:28 PM
To: Maya, Autumn
Cc: Rodriguez, Lisa
Subject: FW: Voyager Card List

Autumn – Please see the list below and confirm this list is correct. Lisa

From: Quintana, Leah
Sent: Tuesday, December 22, 2015 2:59 PM
To: Rodriguez, Lisa
Cc: McCombs, Joshua
Subject: Voyager Card List

Hi Lisa,

Here is the current list of Voyager Card assignments. I want to make sure my current list is correct. Can you please look through this list and let me know if there are any updates? Thanks! ☺

Card Number

Employee's Name

OPP, MELISSA
LOFTUS, CHARLIE
GRIFFITTS, FRANK
McCLAIN, MARK
BUHROW, LAUREN
MAYA, AUTUMN
NUSBAUM, ROGER
PARENTEAU, TODD
MADSEN, ANNALISA
SCOZZARI, PEGGY
ALI, DILSHER
ORTIZ, DANIEL
ARVIZU, FRANCISCO
DAVIES, GEORGIA
CUNNINGHAM, SCOTT
WILLIAMS, TRAVIS
ECKERT, ROBERT
MacDONALD, MADISON
LOOMIS, BUDDY

ACOSTA, DANYA
EDWARDS, MICHAEL
SPENCER, KEVIN
CUELLAR, PAUL
STEVENS, JOHN

Thank you,

Leah Quintana
Accountant III



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1275 W. Washington, Phoenix, AZ 85007
Phone: 602-542-8446 | Fax: 602-542-5940
Leah.Quintana@azag.gov
<http://www.azag.gov>

Diaz, Bethany

From: Maya, Autumn
Sent: Tuesday, December 22, 2015 3:21 PM
To: Rodriguez, Lisa; Email Footprints
Cc: Holtkamp, Ken
Subject: RE: sis please install pc and monitor in room 2209 ISSUE=68519 PROJ=1

Thanks

-----Original Message-----

From: Rodriguez, Lisa
Sent: Tuesday, December 22, 2015 3:16 PM
To: Maya, Autumn; Email Footprints
Cc: Holtkamp, Ken; Rodriguez, Lisa
Subject: RE: sis please install pc and monitor in room 2209 ISSUE=68519 PROJ=1

I will keep in my office.

-----Original Message-----

From: Maya, Autumn
Sent: Tuesday, December 22, 2015 3:10 PM
To: Rodriguez, Lisa; Email Footprints
Cc: Holtkamp, Ken
Subject: RE: sis please install pc and monitor in room 2209 ISSUE=68519 PROJ=1

Ok I spoke to the supervisor and he is in and out of the office this week and next and would like to hold off installation until the first of the year.

If you need me to house the computer I can place it into Don Watola's office where it will be secure.

-----Original Message-----

From: Rodriguez, Lisa
Sent: Tuesday, December 22, 2015 2:22 PM
To: Email Footprints
Cc: Maya, Autumn; Rodriguez, Lisa; Holtkamp, Ken
Subject: RE: sis please install pc and monitor in room 2209 ISSUE=68519 PROJ=1
Importance: High

Autumn - Per our conversation last week, I still have this computer/monitor in my office. Are you still going to be needing it for Room 1045? If so, please advise when a good time for Mike to install it will be. Lisa

-----Original Message-----

From: Email Footprints [<mailto:support@azag.gov>]
Sent: Tuesday, December 22, 2015 1:25 PM
To: Rodriguez, Lisa
Subject: sis please install pc and monitor in room 2209 ISSUE=68519 PROJ=1

When replying, type your text above this line.

The ISS Helpdesk Has created a trouble ticket for Lisa Rodriguez.

Issue number: 68519 Status: Closed

Problem:

sis please install pc and monitor in room 2209

Entered on 12/22/2015 at 11:45:08 MST (GMT-0700) by Ken Holtkamp:
completed

Entered on 12/03/2015 at 11:05:42 MST (GMT-0700) by Michael OHara:
Configured computer and attempted to deliver. Room is locked Frank Arvizu has key to the room and could not be reached. Checked in with Lisa Rodriguez. She asked that the items be left with her until they are ready to be installed.
1045.

Entered on 12/02/2015 at 12:12:11 MST (GMT-0700) by Ken Holtkamp:
sis please install pc and monitor in room 2209

The Help Desk Technician assigned to your trouble ticket is helpdesk, Ken Holtkamp, Michael OHara

If the information is not correct or you have any questions please call the ISS Helpdesk 602 542 4746

These are basic guidelines we use to prioritize problems depending on circumstances there maybe exceptions.

Problems effecting the all of the AGO, all Divisions or sections Problems with Individual users logging in or computer is down A Printer having a problem not printing A user not being able to print Individual computer with a network application problem Computer Moves Software or Hardware Installs Word Excel PowerPoint document Problems Video conferencing, projector setups

Please retain this email as a reference for future questions about this ticket.

Diaz, Bethany

From: Maya, Autumn
Sent: Tuesday, December 22, 2015 11:12 AM
To: Rodriguez, Lisa
Subject: RE: I'm going to leave now. Goodnight and I hope all went well today.

ok

From: Rodriguez, Lisa
Sent: Tuesday, December 22, 2015 10:38 AM
To: Maya, Autumn
Subject: RE: I'm going to leave now. Goodnight and I hope all went well today.

Autumn –

On Monday, 12/21, you arrived to work at 7:30am, ½ hour earlier than your scheduled time and left 5:00pm, ½ hour after your scheduled time. If you are planning on using this time as make-up time for your appointment today, I will approve that. Please submit your make-up time slip and I will adjust your leave slip for today, when I get it.

I believe my email on Friday 12/18 was clear as far as your scheduled time in and time out and ½ hour lunch as you are an hourly employee. It is important that you adhere to your approved work schedule of 8:00am to 4:30pm, everyday unless you receive prior approval. If something comes up that requires you to deviate from your approved schedule, I expect to be notified immediately.

Let me know if you have any questions or need further clarification.
Lisa

From: Maya, Autumn
Sent: Monday, December 21, 2015 4:57 PM
To: Rodriguez, Lisa
Subject: I'm going to leave now. Goodnight and I hope all went well today.

Autumn Maya Law Enforcement Administrator



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Autumn.Maya@azag.gov
<http://www.azag.gov>

Diaz, Bethany

From: Maya, Autumn
Sent: Monday, December 21, 2015 4:57 PM
To: Rodriguez, Lisa
Subject: I'm going to leave now. Goodnight and I hope all went well today.

Autumn Maya
Law Enforcement Administrator



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<http://www.azag.gov>

Diaz, Bethany

From: Maya, Autumn
Sent: Monday, December 21, 2015 4:33 PM
To: Maya, Autumn
Subject: Emailing: DescribingEmpPerformance
Attachments: DescribingEmpPerformance.pdf



Department of
Human Resources

DESCRIBING EMPLOYEE PERFORMANCE FOR STAFF

Mail # AQU 217
2115 Summit Avenue
St. Paul, MN 55105
651-962-6510
www.hr.stthomas.edu

Communication

❖ Communicates ideas orally:

_____ always communicates his/her ideas clearly and concisely. He/she organizes and explains even very complex topics in easy-to-understand terms, and is careful to tailor his/her remarks to his/her audience.

_____ always presents his/her ideas clearly and concisely. If, on occasion, others have difficulty understanding an idea, _____ takes great care to restate the concept in more understandable terms.

_____ usually presents his/her ideas clearly and concisely. He/she generally organizes and explains complex topics in understandable terms.

_____ usually presents his/her ideas clearly and concisely. However, he/she sometimes uses terminology that is unclear to others. _____ would be more effective in his/her communications if he/she used less jargon and fewer technical terms.

_____ has shown that he/she can present ideas clearly and concisely. However, he/she sometimes does not use his/her time to organize and develop his/her ideas. _____ would be more effective in convincing others if he/she took time to prepare and organize his/her ideas.

_____ rarely presents his/her ideas clearly and concisely. He/she often becomes stuck in detail without developing an overall structure and focus for his/her listeners.

_____ would be more effective if he/she organized his/her material so that his/her listeners. _____ would be more effective if he/she organized his/her material so that his/her listeners would have a clearer sense of his/her ideas and objectives.

❖ Communicates ideas in writing:

_____ has excellent writing skills. He/she uses a concise, straightforward style and organizes complex topics in ways that make it easy for his/her audience to grasp the main points.

_____’s writing is straightforward and easy to understand. He/she skillfully uses visuals and illustrations to support his/her clear, concise writing.

_____’s writing is usually clear and easy to understand. He/she uses a straightforward style and organizes topics in ways that help his/her audience grasp the main points.

_____’s writing can be clear and easy to understand. However, on occasion he/she writes documents that are difficult to follow. _____ would be able to convey his/her thoughts more effectively if he/she focused on organizing his/her ideas and then expressing them more directly.

_____’s writing is often clear and easy to understand. However, on occasion, his/her writing tends to be too informal. When he/she writes in a very casual style, he/she risks conveying that he/she does not take the subject seriously. _____ would convey his/her ideas more effectively if he/she wrote in a more polished style.

_____’s writing is often poorly organized. As a result, others find his/her ideas difficult to follow and understand. _____ would convey his/her ideas more effectively if he/she improved the organization of his/her ideas.

_____’s writing is sometimes haphazard and difficult to understand. Some of his/her documents contain obvious grammatical errors and often the thoughts are not particularly well organized. _____ needs to learn to write in a more straightforward, clear, and concise style.

❖ **Demonstrates good listening skills:**

_____ demonstrates excellent listening skills. He/she makes others feel very comfortable in discussions by listening carefully and showing sensitivity to their points of view. He/she restates what has been said to verify that he/she has accurately understood it and asks for clarification on points he/she doesn’t understand.

_____ he/she is a good, conscientious listener. He/she strives to make sure he/she understands the other person’s point of view and asks questions when he/she is missing information or doesn’t understand something.

_____ is generally a good listener. However, sometimes he/she impatiently interrupts people before they are finished. _____ would be more effective in his/her interpersonal relations if he/she were more patient.

_____ is generally a good listener. However, sometimes he/she does not listen closely to others. _____ would be more effective in his/her work and interpersonal relations if he/she spent more time actively listening to others.

_____ is frequently an impatient listener and interrupts people before they are finished. He/she runs the risk of alienating others as well as not fully understanding important facts.

_____ would be more effective in his/her interpersonal relations if he/she spent more time actively listening to others.

_____ frequently does not listen closely to others. As a result, he/she is often unable to reflect back what they have said and others feel he/she discounts their points of view.

_____ would be more effective in his/her work and interpersonal relations if he/she spent more time actively listening to others.

❖ **Receptive to feedback and constructive criticism:**

_____ actively solicits feedback and constructive criticism from others. He/she uses this input to become an even more effective and productive employee.

_____ is generally receptive when others give him/her feedback and constructive criticism. As a result, he/she is usually able to make adjustments and improvements in his/her performance.

_____ is usually receptive when others give him/hr feedback. However, on occasion he/she is defensive when given constructive criticism.

_____ would be more effective if he/she were more open to feedback and used it to make adjustments and improvements in his/her performance.

Is often defensive when given feedback and constructive criticism. As a result, he/she doesn't implement necessary changes in his/her performance.

_____ is often defensive when given feedback and constructive criticism. As a result, he/she doesn't implement necessary changes in his/her performance.

_____ would become a more effective employee if he/she were more open to feedback and applied it to improving his/her skills and knowledge.

❖ **Keeps others informed**

_____ is excellent at keeping others informed. He/she makes sure to provide timely, relevant information to the appropriate people.

_____ is generally good at keeping others informed about relevant information on a timely basis.

_____ is usually good at providing relevant, timely information. However, on occasion, he/she fails to keep others sufficiently informed.

_____ would be a more effective contributor if his/her communications were more consistent.

_____ seldom keeps others sufficiently informed. As a result, work does not progress smoothly and efficiently. _____ would be a more effective contributor if he/she were more timely in communicating relevant information to others.

_____ does not discriminate between information that is relevant and that which is unimportant. As a result, he/she sometimes overloads others with too much information.

_____ would support others more effectively by prioritizing information before providing it.

❖ **Focuses discussion on desired results:**

_____ keeps discussions focused. He/she always clarifies the purpose of a discussion, asks good questions, and listens carefully. When explaining his/her ideas, he/she makes sure they are relevant and expresses them clearly and concisely.

_____ stays focused on the desired outcome of any discussion. He/she competently balances the difficult task of involving others and being sensitive to time pressures while making sure he/she achieves his/her objectives.

_____ usually keeps discussions focused. He/she generally clarifies the purpose of a discussion, asks good questions, and listens carefully.

_____ usually keeps discussion focused. However, at times he/she fails to clarify the discussion objectives or to make sure comments remain relevant to the topic at hand.

_____ can ensure group discussions remain productive and efficient by keeping everyone focused on the desired outcome.

_____ has difficulty keeping discussions focused. As a result, his/her discussions are not as effective or efficient as they could be. _____ could improve his/her discussions by being aware of time constraints and staying focused on the key issues.

_____ has difficulty keeping discussions focused because he/she doesn't clearly set and communicate discussion objectives. As a result, others are often confused about what is needed. By preparing in advance and providing others with a clearer sense of direction, _____ could make discussions more productive and satisfying for himself and others.

Promotes and uses candid and open communication:

_____ has excellent communication skills and has always promoted an atmosphere where candid and open discussions take place. As a result there is free exchange of ideas in his/her group and high morale among team members.

_____ is generally open and direct in is/her communications. He/she encourages free flow of information and usually deals well with difficult or sensitive topics.

_____ is generally open and direct in his/her communications. However, on occasion he/she has been perceived as surreptitious or indirect. _____ would improve his/her communications with his/her team member if he/she were more open and direct.

_____ 's communication is sometimes perceived as surreptitious and indirect. This results in an uncomfortable and untrusting team atmosphere. _____ would improve team morale if he/she were more open and direct.

Decision Making

❖ Use a systematic approach to decision making:

_____ attacks all important decisions carefully and methodically. He/she is careful to base decisions on relevant facts and input, taking into account pertinent long and short-range factors.

_____ has an excellent command of decision-making and problem-solving techniques and applies them appropriately. He/she considers all information available when making a decision and as a result, makes solid, supportable decisions.

_____ has an understanding of decision-making and problem-solving techniques and usually applies them appropriately.

_____ is capable of making very good decisions. He/she takes time to gather relevant data and weighs key factors before coming to a conclusion. However, _____ sometimes rushes an important decision before he/she has all the relevant background information and has

involved others. As a result, his/her decisions are not as sound as they could be. _____ would make better decisions that receive more support if he/she took time to involve the appropriate people.

_____ does not use a systematic approach to decision making. He/she frequently neglects to gather relevant data, seek input from the group, or weigh all factors before coming to a conclusion. As a consequence, his/her decisions are often inappropriate or inadequate.

_____ would improve the quality and effectiveness of his/her decisions if he/she made sure to follow a systematic decision-making process.

_____ needs more decision-making experience. He/she often spends too much time researching an issue rather than working on a solution. _____ would be more effective if he/she moved more quickly to define the problem and spent additional time interacting with the appropriated people.

❖ **Builds consensus for decisions:**

_____ is very careful to involve others in decision making. Whenever he/she is deciding an important issue that will impact others, he/she first solicits input then, discusses potential solutions with group members. He/she listens carefully to their issues and incorporates their input wherever possible.

_____ usually involves others in decision making. He/she solicits input, listens to the issues then, discusses potential solutions with group members.

_____ sometimes makes decisions without consulting with others. While this is appropriate for some decisions _____ should solicit input from team members on important issues more often. _____ would receive more support for his/her decisions by involving his/her team.

_____ is careful to gather input, listen to team issues, and discuss important decisions. However, he/she is sometimes critical of individuals when they say things he/she does not agree with. When this happens, an effective exchange of ideas is stilted. _____ would produce better decisions if he/she listened more openly and was less critical of the opinions of others. He/she would also find that his/her decisions were more enthusiastically supported by the team.

_____ treats decision making as his/her sole responsibility and makes little effort to solicit input from group members. As a result, he/she frequently does not have their support and commitment. _____ would find that morale would be higher and decisions more enthusiastically supported by the group if he/she included group members in the process.

❖ **Considers the impact of decisions:**

_____ is sensitive to the impact of his/her decisions on other departments and on the organization as a whole. When his/her decisions affect others, he/she solicits input and strives to minimize any negative affects. As a result, there is wide acceptance and support for his/her department.

_____ carefully assesses the long-term impact of his/her decisions. He/she has successfully demonstrated that he/she can be effective in the short term while still building for the future.

_____ is usually sensitive to the impact of his/her decisions on other departments and on the organization as a whole. He/she solicits input and strives to minimize any negative affects.

_____ is conscientious about considering the impact of his/her decisions. However, on occasion he/she has been insensitive in the way he/she implements decisions and has caused some problems with morale. _____ would gain wider acceptance and support for his/her decisions if he/she made stronger efforts to solicit input and minimize negative affects.

_____ sometimes takes a narrow view when making decisions which affect others within the organization. As a result, he/she frequently receives only minimal cooperation when he/she attempts to implement changes. _____ would make more solid decisions and get greater cooperation if he/she considered broader organizational impacts.

_____ generally focuses on immediate results and is sometimes insensitive to the long-term impact of his/her decisions. _____ would add greater value to the organization by emphasizing longer-term and more sustainable solutions.

Dependability

❖ Completes assignments and meets commitments:

_____ can always be relied on to complete his/her assignments and keep commitments. He/she makes sure that assignments are delivered on time and are of uniformly high quality.

_____ is highly dependable, doing whatever it takes to meet his/her commitments. This ranges from achieving his/her objectives to completing his/her assignments on time with high quality.

_____ can usually be relied on to complete his/her assignments and keep commitments. His/her assignments are generally delivered on time and are of good quality.

_____ usually completes his/her assignments and keeps commitments. However, on occasion he/she has not delivered as promised. _____ should more carefully examine his/her ability to meet prior commitments before assuming responsibility for additional projects or tasks.

_____’s actions and follow through are not always consistent with his/her commitments. His/her behavior often contradicts a major decision or commitment he/she has made. Projects and objectives that received his/her enthusiastic support in the early stages lose focus or don’t materialize. _____’s lack of follow through undermines his/her credibility.

_____ frequently misses schedule commitments. This affects not only his/her work but also the productivity of other members of the group. _____ needs to be more consistent and reliable in meeting his/her commitments and deadlines if he/she wishes to be considered as an effective contributor.

❖ **Overcomes obstacles to meet or exceed goals and objectives:**

_____ is a very resourceful employee. He/she works well within the system and can be depended upon to find creative ways for overcoming obstacles. He/she consistently meets or exceeds his/her goals.

_____ is a conscientious worker who can generally be relied on to handle projects competently.

_____ can generally be relied on to handle projects competently. On occasion, he/she has had some difficulty overcoming unusual or unexpected obstacles.

_____ often has difficulties handling obstacles that get in the way of reaching his/her goals. In these cases, he/she tends to rely on his/her manager or others for answers and solutions.

_____ would be perceived as a more effective employee if he/she were more persistent in finding creative ways to handle the challenges he/she meets.

❖ **Requires little supervisory follow-up on assigned projects and tasks**

_____ is highly dependable and can be counted onto work independently. When situations change, he/she assumes responsibility for communicating any change to the appropriate people. His/her ability to work with little direction is a key strength.

_____ is an independent worker who needs little supervision from his/her manager or other team members. He/she can be counted on to complete assignments thoroughly and on time.

_____ is a competent and conscientious worker who can usually be counted on to complete his/her job with minimal direction or supervision.

_____ can be counted on to follow through on his/her commitments without close supervision. However, he/she could occasionally do a better job communicating the results to his/her manager.

_____ tends to rely on his/her manager and others for solutions to problems that arise in his/her work. Without supervision, _____ generally cannot be depended on to find solutions or follow up on important situations. _____ would be viewed as an effective contributor if he/she assumed responsibility for working more independently.

_____ requires close supervision to make sure he/she meets deadlines. _____ needs to improve his/her ability to monitor his/her own progress on projects and ask for assistance when he/she needs help.

❖ **Meets attendance requirements:**

_____ has an excellent attendance record. He/she is very punctual and can be depended on to not only fulfill his/her normal work functions but to also take on extra work when

necessary. When his/her schedule changes for any reason, he/she keeps the rest of the team informed.

_____ can be counted on to be at work and to get the job done. He/she is a reliable and conscientious employee.

_____ can usually be counted on to be at work and to get the job done. On occasion, he/she has been unreliable in his/her attendance.

_____ is often un reliable in his/her attendance. This affects the productivity of the entire team. _____ needs to be more dependable and consistent in his/her attendance.

❖ **Responsive to manager's suggestions and guidance:**

_____ is very responsive to his/her manager's suggestions and guidance. He/she has shown a willingness and ability to follow directives promptly and thoroughly.

_____ is usually responsive to his/her manager's suggestions and guidance. He/she can be counted to follow through on directives.

_____ is sometimes unresponsive to his/her manager's suggestions and guidance. _____ would be more effective if he/she followed directives more promptly and thoroughly.

_____ is often unresponsive to his/her manager's suggestions and guidance. As a result, the quality and timeliness of his/her work suffers. _____ would be more effective if he/she followed directives more promptly and thoroughly.

❖ **Accepts accountability for own actions:**

_____ readily accepts accountability for his/her own actions and does what is necessary to get his/her job done. As a result, he/she is a very effective employee who is viewed by his/her colleagues as a dependable team member.

_____ usually accepts accountability for his/her own actions. As a result, he/she generally does what is necessary to perform his/her job satisfactorily.

While _____ usually accepts accountability for his/her own actions, he/she sometimes blames circumstances or other individuals for his/her inability to perform effectively. _____ would improve his/her performance by becoming more proactive and accountable.

_____ assumes little responsibility for his/her own actions. He/she often blames circumstances or others for his/her inability to perform effectively. As a result, he/she seldom makes the effort necessary to do a satisfactory job. _____ would improve his/her performance by becoming more proactive and accountable.

Initiative

❖ Can be a self-starter who takes independent action:

_____ is very capable of assessing a situation and taking independent action when conditions require it. He/she is confident of his/her judgment and accepts responsibility for his/her actions. _____ is a self-starter who needs minimal guidance and coaching.

_____ assumes responsibility and does what is necessary to get the work done. He/she takes the initiative to start and follow through on tasks.

_____ is reasonable good at working without close supervision. When the task is clear, with well defined objectives, he/she is successful. However, he/she doesn't always handle situations well when the problem needs better definition or direction has been limited.

_____ is a confident contributor who readily takes responsibility and does what is necessary to get the work done. _____ rarely experiences unforeseen problems because of his/her thoughtful and conservative style. However, there are times when bolder more innovative actions might produce greater results. _____ has the opportunity to become an even stronger contributor by initiating and driving new approaches and ideas.

_____ does not take action, even in special circumstances, before getting others involved. He/she tends to ignore tasks that are outside his/her normal responsibilities, even when they are clearly important and he/she is capable of handling them. While under some circumstances this might be prudent, many situations require that _____ take action without delay.

❖ Develops new plans and ideas when situations change:

_____ is sensitive to changing circumstances and is always ready to adjust his/her approach for maximum effectiveness. He/she is creative and resourceful in devising new ways to accomplish goals.

_____ pays attention to changing circumstances and is able to develop new plans and ideas when situations change.

_____ performs well under normal circumstances, but is sometimes slow to react to changing situations, and waits for others to take action first. _____ would be more effective if he/she were more sensitive to changing circumstances and took the initiative when changes are needed.

_____ performs well under normal circumstances, but doesn't adjust easily to changes in practices and routines. He/she would be more effective if he/she responded to changes more positively.

_____ tends to make change for its own sake without considering the impact of these changes on other people. As a result he/she sometimes creates unnecessary confusion. He/she would be more effective if he/she were more careful when considering making changes.

❖ **Pursues problems with vigor and a sense of urgency:**

_____ clearly enjoys a challenge and treats problems as opportunities to exercise and improve his/her skills. He/she focuses sharply and intensely, and stays with a problem until it is solved.

_____ eagerly tackles problems. He/she differentiates between problems that require priority attention and those that don't. When action is called for, he/she responds with vigor and a sense of urgency.

_____ generally handles problems competently. He/she responds when action is needed.

_____ is usually able to focus on problems, but sometimes gives the impression that solving problems is a low priority for him/her. This perception is reinforced when problems are not dealt with expeditiously. _____ would be viewed as a stronger contributor if he/she approached problems with a greater sense of urgency.

_____ is reluctant to interrupt the flow of work by addressing problems and concerns as they arise. As a result, he/she risks problems in the future. _____ would be more effective if he/she addressed problems as they arise.

❖ **Takes on and completes new tasks:**

_____ readily volunteers for new tasks. He/she constantly stretches beyond his/her job description into new areas and projects. He/se needs little direction to complete new tasks completely and on time.

_____ is always eager to take on new responsibilities. He/she is able to manage a heavy workload and maintains a consistently high level of performance on both his/her routine tasks along with his/her other responsibilities.

_____ is usually willing to take on new responsibilities. He/she is able to handle the demands of the new tasks along with his/her other responsibilities.

While _____ usually does not seek out new tasks, he/she has demonstrated an ability to take on and successfully complete new tasks when needed. He/she is able to handle the demands of the new tasks along with his/her other responsibilities.

_____ seldom volunteers to take on new tasks. By being more willing to take on additional tasks, _____ would be viewed as a stronger and more capable contributor.

_____ has difficulty completing new tasks which are added to his/her routine work load. By being more conscientious in handling additional tasks, _____ would be viewed as a more effective contributor.

❖ **Seeks new tools, job training, and learning opportunities:**

_____ actively pursues new tools, techniques, job training, and learning opportunities. As a result, _____ is a consistently excellent performer and a great resource for others on his/her team.

_____ exhibits tremendous initiative in seeking out whatever he/she needs to perform his/her job in an exemplary fashion. If he/she doesn't possess the skills or knowledge to handle a project, he/she finds ways to obtain them through training or other learning opportunities. He/she is always seeking new tools and techniques to be even more productive.

_____ is competent in performing his/her job. He/she seeks out and takes advantage of training and learning opportunities.

_____ takes advantage of training and learning opportunities that are presented to him/her. However, he/she could be more proactive in seeking out new tools, techniques, and learning opportunities on his/her own.

_____ has a solid understanding of the routine aspects of his/her job. However, he/she seldom tries to stretch beyond his/her current knowledge and ways of doing things.

_____ would be a more effective contributor if he/she were more proactive in seeking out new techniques and learning opportunities to improve his/her skills and knowledge.

❖ **Recognizes opportunities and acts on them:**

_____ is quick to recognize new opportunities. He/she shows a tremendous amount of initiative in pursuing these opportunities and needs little direction in determining the most successful ways to act on them.

_____ generally recognizes new opportunities. He/she shows initiative in pursuing these opportunities and determining the most successful ways to act on them.

_____ is competent in performing his/her job and often recognizes new opportunities. However, he/she is often cautious about pursuing them and waits for others to take the initiative to act on them.

_____ is conscientious in performing his/her regular activities but seldom recognizes new opportunities. _____ would be a more effective contributor if he/she looked beyond his/her routine tasks to identify and pursue new opportunities.

❖ **Defines responsibilities in broad terms:**

_____ broadly defines his/her job responsibilities. As a result, he/she shows a tremendous amount of initiative in actively pursuing new projects and tasks that expand his/her contribution to the company.

_____ is competent in performing his/her job. He/she usually takes a broad interpretation of his/her responsibilities and takes on new projects and tasks that expand his/her contribution to the company.

_____ sometimes takes on new projects and tasks. However, on occasion he/she narrowly defines his/her areas of responsibility and limits his/her contribution to the company.

_____ narrowly defines his/her areas of responsibility and is unlikely to tackle anything beyond the strictest interpretation of his/her duties. As a result, problems sometimes develop that could have been avoided. _____ would be a more effective employee if he/she broadened his/her scope of accountability.

Job Knowledge

❖ Understands the duties and responsibilities of the job:

_____ thoroughly understands the duties and responsibilities of the job. Because of his/her solid grasp of his/her position, he/she is able to act on his/her own initiative. He/she is alert to changes in his/her environment and responds rapidly to meet them.

_____ generally understands the duties and responsibilities of the job. As a result, he/she is often able to act on his/her own initiative.

_____ generally understands the duties and responsibilities of the job under normal circumstances. However, when something out of the ordinary occurs, he/she is not always able to act confidently and decisively.

_____ is often confused about the duties and responsibilities of the job. As a result, he/she often neglects key tasks which causes disruptions in the work flow and distracts others.

_____ needs to work closely with his/her manager until he/she becomes clear about his/her duties and responsibilities.

❖ Has the knowledge necessary to perform the job:

_____ is very knowledgeable about what is necessary to perform effectively in his/her job. When he/she does not know something, he/she is able to identify what is needed and get the necessary information very efficiently.

_____’s excellent skills and thorough knowledge of his/her job have enabled him/her to maintain a high level of productivity, even when learning new roles and responsibilities.

_____ demonstrates a solid knowledge of the theory, principles, and skills necessary to perform his/her current job. He/she generally is able to complete his/her work with minimal assistance from others.

_____ can usually do the routine parts of his/her job. However, he/she is less comfortable handling non-routine matters and occasionally needs assistance from others.

_____ does not have the knowledge to do a minimally acceptable job without close supervision. _____ needs to increase his/her job knowledge and operate more independently to be considered an adequate contributor.

_____ lacks some basic knowledge needed to perform his/her job. He/she is a willing worker, but sometimes uses poor judgment as a result of his/her lack of job knowledge. _____ needs to increase his/her knowledge of the job in order to show better judgment in his/her undertakings.

❖ **Has necessary technical knowledge:**

_____ has excellent technical expertise. He/she invests a great deal of his/her time in learning, interpreting, and applying technical knowledge. Others regard him/her as a great resource for technical information.

_____’s breadth of technical knowledge is beyond that required for his/her position. He/she is very thorough in digesting and assimilating new information. He/she understands both the theoretical and practical aspects of his/her work.

_____ has adequate technical knowledge to perform his/her job. He/she is generally able to apply that knowledge proficiently and learn new information as required.

_____ sometimes lacks the technical knowledge necessary for his/her position. _____ needs to increase his/her technical expertise in order to improve his/her performance.

_____’s technical knowledge is inadequate for his/her position. _____ needs to improve his/her technical expertise in order to perform his/her duties satisfactorily.

❖ **Understands the mission and values of the organization:**

_____ clearly understands the organization’s mission and the values by which it operates. He/she is aware of how his/her work integrates with and advances the goals of the organization. His/her commitment and dedication to the company make him/her an excellent role model for those seeking to understand the values and how they impact day-to-day operations.

_____ generally understands the organization’s mission and the values by which it operates.

_____ is generally well-informed about the organization’s overall values and mission. However, he/she sometimes acts in ways that do not actively promote the mission and values.

_____ is unfamiliar with the organization’s mission and values. His/her decisions and interactions are sometimes inconsistent with the values of the organization. _____ should actively look for ways to align his/her efforts with company goals.

_____ doesn’t follow the mission or values of the organization. It is important that when he/she is acting on behalf of the organization, he/she behaves according to the organization’s values. _____ should actively look for ways to align his/her efforts with company goals.

❖ **Implements organization policies:**

_____ is conscientious about implementing organization policies. When new directives are issued, he/she accepts them in a positive spirit and puts them into effect. He/she is supportive of the efforts of the administration to run a smooth organization and offers constructive comments where appropriate.

_____ is generally conscientious about implementing organization policies. When new directives are issued, he/she usually accepts them in a positive spirit and puts them into effect.

While _____ is generally supportive of changes or additions to organization policy, he/she has on occasion indicated some reluctance until he/she fully understood the reasons behind the change. His/her resistance was communicated to others and that slowed the acceptance of the changes by the group. By withholding negative reactions until he/she is certain he/she understands the reasoning, and then, if he/she disagrees, voicing his/her opinion quietly to his/her manager, _____ would contribute to smoother transitions.

_____ tends to disregard specific policy directives. This attitude is communicated to others in the group and causes disruptions in the smooth operations of the group. It is important that he/she makes sure he/she understands the policies, voices any objections to his/her manager, but then follows whatever is finally adopted.

❖ **Keeps up-to-date with new developments:**

_____ keeps up-to-date on new developments in his/her field by reading extensively, attending seminars, and maintaining contacts with colleagues. He/she is well respected by his/her peers and adds value to the organization by his/her knowledge.

_____ usually keeps up-to-date on new developments in his/her field by reading, attending seminars, and maintaining contacts with colleagues.

_____ sometimes keeps up-to-date on new developments in his/her field. However, he/she could make a stronger effort in this area. _____ would be able to tackle problems with new techniques and approaches if he/she were more aggressive in updating his/her knowledge.

_____ does not keep current with new developments in his/her field. While he/she is able to do the routine parts of his/her job adequately, he/she does not contribute new and innovative thinking within the group. _____ would increase his/her credibility with his/her peers as well as enhance his/her value to the organization if he/she updated his/her job knowledge.

❖ **Has facility with computer hardware, software and other equipment:**

_____ takes the time to master the equipment required to do his/her job. He/she is rarely stumped by computer hardware or software problems. He/she can operate other necessary equipment smoothly and without help.

_____ is generally competent working with computers, software, and the other equipment required to do his/her job.

_____ understands the basics about computers, software, and the other equipment required to do his/her job, but sometimes requires help from others.

_____ has very minimal skills using computer hardware, software, and the other equipment required to do his/her job. As a result he/she frequently needs help and distracts others from their work. Lack of knowledge limits his/her productivity. At a minimum, he/she needs to learn basic procedures and be able to get information on his/her own without distracting others.

Judgment:

❖ Uses past experience when making decisions:

_____ takes advantage of the experience and knowledge he/she has gained during his/her career. As a result, he/she is able to take a broad perspective on problem-solving and his/her decisions are very solid and effective.

_____ uses his/her past experience and knowledge when making decisions. This helps him/her make better informed decisions and avoid unnecessary errors.

_____ generally makes good decisions. On occasion, he/she has made errors in judgment that could have been avoided if he/she had relied on his/her past experience.

_____ has made errors in judgment that could have been avoided if he/she had relied on his/her past experience. _____ needs to make better use of his/her past experience and knowledge.

❖ Capable of making decisions under time pressure with limited information:

_____ is excellent at making decisions under time pressure with limited information. He/she is able to judge when the cost of not making a decision is higher than the benefit of waiting for more information. He/she then takes action and moves steadily and confidently forward.

_____ is capable of making decisions under time pressure with limited information. He/she shows good judgment in trading off the need for more information with the necessity of making timely decisions.

_____ is generally a good decision maker. However, he/she sometimes has difficulty making decisions under time pressure with limited information.

_____ has difficulty making decisions under time pressure with limited information. As a result, he/she often hampers progress by postponing decisions that must be made.

_____ would be more effective if he/she improved his/her ability to make decisions in those situations where the cost of not making a decision is higher than the benefit of waiting for more information.

_____ has difficulty making decisions under time pressure with limited information. As a result, his/her decisions are sometimes inappropriate or inadequate. _____ would be more effective if he/she improved his/her decision-making skills.

❖ **Prioritizes tasks:**

_____ has done an excellent job of prioritizing his/her tasks and scheduling rush priorities to make sure due dates are met. He/she always makes a point to understand the relative importance of projects assigned to him/her in order to make sure he/she meets expectations.

_____ is good at prioritizing his/her tasks. He/she knows what his/her deadlines are and generally meets them.

_____ is good at prioritizing his/her tasks. He/she knows what his/her deadlines are and generally meets them.

While _____ is often good at prioritizing his/her tasks, he/she has sometimes failed to prioritize his/her work effectively. When this happens, he/she doesn't meet schedule commitments.

_____ often does not prioritize his/her tasks effectively to meet schedule commitments. As a result, his/her work and the productivity of the entire team suffer. _____ would be more effective if he/she made sure that he/she understood the overall group priorities and then organized his/her tasks effectively to meet those priorities in a timely manner.

_____ often undertakes tasks which he/she decides are important even though they are not consistent with the priorities of the team or his/her manager. _____ would be more effective if he/she made sure that he/she understood the overall group priorities and then organized his/her tasks effectively to meet those priorities in a timely manner.

❖ **Able to take a broad perspective when making decisions:**

_____ is able to take a broad perspective when making decisions. His/her ability to look at the big picture and understand how various issues and problems interrelate has made him/her an extremely effective decision maker.

_____ is usually able to take a broad perspective when making decisions. He/she considers the big picture and how various issues and problems relate.

_____ is usually able to take a broad perspective when making decisions. On occasion, he/she has had difficulty looking at the big picture and understanding how various issues and problems interrelate.

_____ has difficulty taking a broad perspective when making decisions. As a result, his/her decisions are sometimes inadequate. _____ would improve the quality and

effectiveness of his/her decisions if he/she made sure to look at the big picture and understand how various issues and problems interrelate.

❖ **Uses appropriate channels of communication:**

_____ always uses the most appropriate channels for his/her communications. He/she is very effective in the way he/she utilizes memos, phone calls, electronic mail, on-on-one discussions, and group meetings to accomplish his/her objectives.

_____ is generally effective in the way he/she utilizes memos, phone calls, electronic mail, one-on-one discussions, and group meetings to accomplish his/her objectives. He/she has a good understanding of the appropriateness of each type of communication.

_____ sometimes chooses inappropriate channels for his/her communications.

_____ needs to be more sensitive to the appropriateness of each type of communication and judge which is the most effective in each specific

_____ often chooses inappropriate channels for his/her communications. As a result, he/she is ineffective in accomplishing his/her objectives. _____ needs to be more sensitive in choosing his/her communication channels and judging which is the most effective in each specific situation.

❖ **Provides manager with useful feedback:**

_____ provides useful feedback to his/her manager on a regular basis. He/she keeps his/her manager informed about relevant situations both within and outside the department and offers keen insights and astute suggestions.

_____ provides useful feedback to his/her manager. He/she is generally able to judge which information is relevant and which is unimportant. He/she also offers solid input and suggestions when appropriate.

_____ sometimes has difficulty judging what is useful feedback for his/her manager. When this happens, he/she provides information that is irrelevant or offers ineffective input and suggestions.

_____ has difficulty judging what is useful feedback for his/her manager. As a result, he/she often provides information that is irrelevant or offers ineffective input and suggestions.

_____ would be viewed as a more effective and perceptive contributor if he/she improved his/her ability to assess and communicate relevant feedback to his/her manager.

Leadership:

❖ A persuasive leader who gets results:

_____ is a very persuasive and positive leader. He/she actively sells his/her ideas and projects. When he/she is making his/her position known, he/she does so in a well-organized fashion, and supports it with clear and compelling arguments. _____ is respected and inspires enthusiasm within his/her group.

_____ is generally a convincing leader who gets results within his/her group. He/she presents ideas effectively and supports them with clear and compelling arguments.

_____ thinks through his/her arguments quite well, but occasionally doesn't give others time to come around to his/her point of view. He/she is sometimes impatient which tends to foster unnecessary opposition to his/her points. _____ would be more successful if he/she were more patient when handling objections and concerns expressed by others.

_____ can be persuasive on some occasions. On issues where he/she doesn't have strong feelings, he/she is often uninvolved. _____ has good ideas and the group would benefit if he/she spoke up more often.

_____ sometimes has difficulty getting others to understand or accept his/her ideas. He/she doesn't take the time necessary to organize his/her ideas and develop a strategy for getting them accepted. When objections are raised, he/she isn't always prepared to answer them. He/she would be far more effective if he/she spent time thoroughly preparing for key talks and meetings.

_____ is reluctant to speak up in group situations. He/she generally accepts whatever viewpoint others have to offer. If he/she has an objection he/she does not make it known. Because of his/her reluctance to speak up, the team doesn't benefit from his/her ideas, and he/she has little voice in shaping the group's overall direction. _____ would be a stronger contributor if he/she spoke up more often.

_____ has difficulty commanding the attention of the group. When he/she attempts to raise questions or objections, he/she does so with hesitation and lacks confidence.

_____ needs to be more assertive in group situations when he/she has something to offer.

❖ Can delegate tasks and projects:

_____ delegates wisely and effectively. He/she understands the abilities of the individuals on his/her team and gives each an appropriate level of independence. He/she establishes roles and responsibilities, clearly specifies the outcomes he/she wants to achieve, and conducts periodic meetings to track progress.

_____ usually delegates effectively. He/she establishes roles and responsibilities, specifies the outcomes he/she wants to achieve, and conducts periodic meetings to track progress.

_____ has high faith in his/her subordinates and delegates frequently. On some occasions, he/she needs to follow progress more closely. _____ would improve the effectiveness of his/her people if he/she assisted those needing more supervision and made sure to clarify the goals of the project from time to time.

_____ has a tendency to become personally immersed in solving problems that should be handled by his/her team. He/she should delegate more frequently and focus his/her efforts on setting measurable objectives and keeping his/her team motivated. When _____ sees individuals struggling to solve a problem, he/she should use it as an opportunity to step in and coach, but not take over.

_____ delegates frequently, but assignments are made without ensuring that adequate resources are available. He/she needs to empower team members and make them feel truly accountable by first making sure that the necessary resources and support are available before he/she turns a project over to them.

_____ is unwilling to relinquish tasks or responsibility to others. When he/she does delegate, _____ does not allow the individual to take responsibility for the project. Instead, he/she insists on being involved in every detail. This behavior is frustrating to team members. He/she needs to focus his/her efforts on setting measurable objectives and keeping his/her team motivated. When he/she sees an individual struggling to solve a problem, he/she should use it as an opportunity to step in and coach, but not take over.

❖ **Provides regular and appropriate feedback to subordinates:**

_____ clearly understands the need for employees to know how they are doing. He/she has taken great care to establish measurable objectives with his/her subordinates and provide positive reinforcement for their efforts. He/she is also quick to provide feedback and coaching to head off small problems before they become large ones.

_____ usually gives constructive feedback to his/her team. He/she sets measurable objectives with subordinates, provides positive reinforcement for their efforts, and coaches them when necessary.

While _____ often gives constructive feedback to his/her team, he/she needs to provide it on a more frequent basis. _____ would get better results by providing regular feedback, both positive and corrective, to all team members.

_____ provides infrequent feedback to team members. As a result, they are often unsure of how they are doing and morale suffers. _____ would get better results by providing regular feedback, both positive and corrective, to all team members.

_____ sometimes does not provide appropriate feedback to team members. He/she does not always praise good performance. On occasion he/she allows poor performance to go unchecked. _____ would get better results by providing regular feedback, both positive and corrective, to all team members.

❖ **Uses positive techniques to motivate:**

_____ creates a supportive climate that inspires his/her staff to excellence. When individuals struggle, he/she is ready to coach, advise, and encourage. His/her complete faith in others inspires the group to excel.

_____ has the ability to describe assignments and outcomes in terms that make the most difficult tasks seem achievable and inspires people to tackle them. He/she is careful to reinforce all desired behavior.

_____ usually creates a supportive atmosphere. He/she is positive when coaching, advising, and encouraging his/her team.

While _____ usually creates a supportive atmosphere, he/she is sometimes perceived as harsh or overly critical. _____ would create a more comfortable working environment if he/she offered positive strokes more frequently and focused on what can be improved.

While _____ usually creates a supportive atmosphere, he/she is sometimes perceived as overemphasizing his/her authority and dwelling on negative consequences. _____ would find the team responding more enthusiastically to his/her requests if he/she offered positive and collaborative leadership style.

_____ is motivated to help others improve, but is often perceived as harsh or overly critical. This has a negative effect on morale. _____ would create a more comfortable working environment if he/she offered positive strokes more frequently and focused on what can be improved.

_____ tends to overemphasize his/her authority and dwell on negative consequences to subordinates rather than stressing the positive results that come from good job performance. This approach runs the risk of producing friction and undermining longer term gains.

_____ would find the team responding more enthusiastically to his/her requests if he/she used a more positive and collaborative leadership style.

❖ **Viewed as a fair leader:**

_____ is always even-handed and shows no favoritism toward nor bias against any employee. He/she exhibits tolerance for different abilities without making concessions that would undermine standards. The entire group respects his/her fairness.

_____ is perceived as an excellent and fair manager for the way he/she distributes rewards and recognition to team members. Rewards and direct feedback are always given appropriately and without bias or favoritism.

_____ is generally perceived to be a fair and even-handed manager. He/she is able to exhibit tolerance for different abilities without making concessions that undermine standards.

While _____ is generally considered to be a fair and even-handed manager, he/she is sometimes perceived as favoring some members of his/her group over others. _____ needs to rectify this perception.

_____ is frequently perceived as favoring some members of his/her group over others. This perception by some team members lowers group morale and undermines the team's overall effectiveness. _____ needs to immediately rectify this perception.

_____ makes too many concessions for poorer performers within the group. He/she has a tendency to assign the most difficult projects to the hardest workers thus rewarding less productive workers with easier assignments. This is obvious to the higher performers and tends to lower their morale. _____ needs to address the disparity in performance and challenge the poorer performers to do better.

❖ **Sets and achieves high standards with his/her team:**

_____ establishes and gets his/her team to commit to high standards. He/she achieves this by establishing clear objectives, communicating these standards, and utilizing standards and is diligent about meeting deadlines. His/her team is very professional.

_____ demands a lot from himself and his/her team. He/she maintains strict quality standards and is diligent about meeting deadlines. His/her team is very professional.

_____ is usually consistent in setting and achieving high standards with his/her team. He/she tries to develop a clear understanding with team members as to what results must be accomplished and when.

_____ is sometimes inconsistent in setting and achieving standards with his/her team. He/she should define tasks clearly and be sure to assign responsibility within the group.

_____ has not established clear standards for quality or productivity with his/her team. His/her expectations are sometimes perceived as capricious or arbitrary. _____ can increase the performance of his/her group by clearly communicating what he/she expects and by vigorously working with his/her team to achieve those standards.

_____ has difficulty setting and achieving standards with his/her group. He/she does not define tasks clearly and has no consistent method of assigning responsibility within the group. _____ needs to organize the team for success by assigning clear responsibility and line authority.

Planning

❖ **Establishes goals and plan:**

_____ is very effective at establishing overall goals and then determining the systematic steps necessary to reach those goals. He/she formulates initial strategies and tactics and demonstrates excellent judgment and flexibility in readjusting them as necessary.

_____ is usually effective at establishing overall goals and then developing sound action plans to achieve results. He/she is well organized and able to make adjustments to his/her plans as needed.

While _____ is usually good at organizing and implementing tactical plans, he/she often has difficulty establishing overall goals. As a result, he/she lacks focus in his/her work. _____ would be more productive and experience fewer problems if he/she established well-defined goals for his/her work.

_____ is usually good at establishing overall goals, but has difficulty organizing and implementing action plans. Consequently, he/she is often unable to achieve his/her desired results. _____ would be more effective if he/she learned to formulate comprehensive and flexible plans.

❖ **Capable of managing several assignments at the same time:**

_____ has the ability to plan, organize, and prioritize his/her work. He/she is capable of managing several assignments at the same time and consistently brings his/her projects in on schedule and on plan.

_____ is capable of managing several assignments at the same time. He/she plans and organizes his/her work so that he/she is generally able to meet his/her deadlines and keep his/her commitments.

_____ often plans his/her work and implements his/her plans effectively. However, on occasion he/she over commits him/herself. _____ would be more effective if he/she planned and organized his/her work better, focusing on the most important tasks.

_____ sometimes plans his/her work and implements his/her plans effectively. However, he/she often over commits him/herself. _____ would be more effective if he/she planned and organized his/her work better, focusing on the most important tasks.

In general, _____'s planning and organization within a job is good, but he/she has difficulty when handling several assignments at the same time. As a result, he/she often misses deadlines and causes disruptions for the entire group. _____ needs to become more focused on coordinating and prioritizing tasks across several assignments so that he/she can meet his/her commitments.

❖ **Determines necessary resources:**

_____ is very conscientious in determining what resources are necessary and making sure they are available when needed. As a result of his/her excellent planning skills, his/her projects run smoothly on time and on budget.

_____ is usually effective in planning what resources are necessary and making sure they are available when needed. As a result, his/her projects generally come in on time and on budget.

While _____ is generally effective in planning, he/she sometimes fails to determine what resources are necessary and make sure they are available when needed. As a result, he/she occasionally misses deadlines or goes over budget.

_____ frequently fails to plan for future resources. As a result, he/she sometimes misses deadlines or goes over budget. _____ would be more effective if he/she were more conscientious in determining what resources are necessary and making sure they are available when needed.

❖ **Produces routine reports that are on time and accurate:**

_____ is diligent in producing routine reports. He/she plans and organizes his/her work so that his/her reports are always very accurate and timely.

_____ can generally be counted on to produce routine reports that are accurate and on time. He/she demonstrates good organization in meeting these commitments.

While _____ can generally be counted on to produce routine reports, he/she is occasionally late with his/her reports. _____ would be more effective if he/she organized his/her work so that he/she meets his/her regular, ongoing commitments more consistently.

While _____ can generally be counted on to produce routine reports, he/she is occasionally inaccurate in his/her reports. _____ would be more effective if he/she paid greater attention to detail.

_____ has difficulty producing routine reports on time. As a result, those who use his/her reports are inconvenienced and lose time following up with him/her. _____ needs to plan and organize his/her work more effectively so that he/she meets his/her regular, ongoing commitments.

_____ is often inaccurate when producing routine reports. As a result, his/her credibility has suffered and those who use his/her reports are inconvenienced and lose time following up with him/her. _____ would be more effective if he/she paid greater attention to detail.

❖ **Aligns plans with departmental and corporate objectives:**

_____ is very conscientious in keeping up to date on departmental, division, and corporate objectives and making sure his/her plans are in alignment with them. He/she demonstrates great flexibility in resetting priorities and adjusting plans as necessary.

_____ is viewed as a very focused, productive, and efficient contributor.

_____ stays aware of changing departmental, division, and corporate objectives and generally keeps his/her plans in alignment with them.

While _____ usually stays aware of changing departmental, division and corporate objective, he/she sometimes has difficulty keeping his/her plans in alignment with them. _____ would be more effective if he/she made sure his/her plans were feasible given overall objectives and constraints.

_____ often creates plans that are not in alignment with departmental, division, or corporate objectives. As a result, his/her plans often need rework and there is a significant loss

in productivity and efficiency. _____ would be more effective if he/she made sure his/her plans were feasible given overall objectives and constraints.

❖ **Sensitive to the time constraints of others:**

_____ is sensitive to the time constraints of others. He/she is excellent at planning and organizing his/her work so that those who interact with him/her can accomplish their tasks efficiently, without delay or hassle.

_____ is generally sensitive to the time constraints of others. He/she tries to plan and organize his/her work so that people can use their time effectively when dealing with him/her.

While _____ is generally sensitive to the time constraints of others, he/she sometimes fails to plan and organize his/her work so that people can use their time effectively when dealing with him/her.

_____ can be insensitive to the time constraints of others. He/she often fails to plan and organize his/her work in a way that allows people to deal with him/her efficiently. As a result, people sometimes feel they are wasting time and experiencing unnecessary delays or hassles.

_____ needs to be more considerate and do a better job of planning and organizing.

Problem Solving:

❖ **Develops effective plans and solves problems:**

_____ is excellent at developing effective plans and solving problems. He/she gets input from others and considers different views before deciding upon a final approach. He/she also clearly identifies the tasks necessary to solve the problem.

_____ is usually good at developing effective plans and solving problems. He/she gets input from others and identifies the tasks necessary to solve the problem.

_____ can often develop an effective plan for solving problems. However, when problems are more complex, he/she has difficulty in identifying appropriate tasks and quickly taking action.

_____ can identify sound solutions to problems. However, he/she often fails to get support for his/her plan before acting. _____ should determine the individuals who are critical to his/her success and get them involved before attempting to implement his/her plan.

_____ usually does not spend the time needed to develop effective plans for solving problems. As a result, he/she misses pertinent information or fails to involve all the necessary individuals. _____ could solve problems more effectively by taking the time to develop more thoughtful solutions.

_____ has difficulty developing effective plans for solving problems. His/her plans are sometimes unrealistic and often require resources that are not available. _____ would

be a better problem solver if he/she developed plans that were more realistic and had a higher probability of successful implementation.

❖ **Anticipates and recognizes potential problems:**

_____ is excellent at anticipating potential problems and developing effective measures to correct them. As a result, he/she is able to rapidly respond to problems when they occur and resolves them before they become fully developed.

_____ is usually able to recognize a developing problem and take action to correct it. He/she pays attention to detail and often formulates thoughtful and original solutions.

While _____ is often able to recognize developing problems, he/she sometimes fails to anticipate potential problems and take corrective action.

_____ seldom anticipates or recognizes potential problems. As a result, he/she is often inadequately prepared when problems occur. His/her hasty responses are not always effective or appropriate. _____ would experience fewer disruptions and get better results by being more attentive to situations where problems can be anticipated.

❖ **Defines problems:**

_____ quickly and accurately defines problems. He/she is able to sort through the complexities of a problem and distinguish unimportant or irrelevant issues from the key components. Consequently, he/she is both efficient and effective in his/her problem solving.

_____ can usually accurately define a problem, particularly those that are not too complex.

While _____ can usually accurately define a problem, he/she sometimes has difficulty with complex problems.

_____ has difficulty in accurately defining problems. He/she often focuses on unimportant issues. As a result, he/she loses time and generates inadequate solutions.

_____ would create more robust solutions by doing a better job examining a problem before acting.

❖ **Determines the cause of problems before taking action:**

_____ is a highly effective problem solver who routinely deals with complex and sensitive issues. He/she is careful to investigate and identify the cause of a problem before proceeding with corrective measures.

_____ has shown an ability to solve problems effectively. He/she usually identifies the cause of a problem before proceeding with corrective measures.

While _____ has shown an ability to solve problems effectively, he/she sometimes doesn't take the time to identify the cause of a problem before proceeding with corrective

measures. _____ would be a more effective problem solver if he/she took the time to get input from others and identify the underlying issues.

_____ rarely takes the time to identify the cause of a problem before proceeding with corrective measures. Consequently, his/her solutions are often incomplete or ineffective.

_____ would be a more effective problem solver if he/she took the time to get input from others and identify the underlying issues.

_____ is careful to study the cause of a problem before proceeding with corrective steps. However, he/she often spends too much time studying a problem. As a result, he/she has insufficient time to develop and implement an effective solution plan. _____ would become a more effective problem solver if he/she could more carefully balance his/her efforts between studying and acting on a problem.

❖ **Generates alternative solutions when solving problems:**

When dealing with major decisions, _____ is careful to spend time on developing more than one solution. As a result, he/she has a more thorough understanding of the situation and the final decision is more complete. When problems arise, he/she is able to rapidly adjust.

_____ thinks through major decisions and takes the time to analyze potential problems. He/she usually develops contingency plans and is generally prepared to act promptly and effectively when problems arise.

While _____ has shown he/she knows how to think through major decisions and analyze potential problems, he/she sometimes fails to develop contingency plans. When this happens, he/she is unprepared to act promptly and effectively when problems arise.

_____ seldom generates more than one solution. As a result, his/her decisions often neglect important considerations or overlook crucial factors. When problems occur, he/she is not prepared with contingency solutions. _____ would improve his/her decisions as well as respond quicker when problems occur if he/she generated several alternative solutions.

_____ develops contingency alternatives in case his/her original approach does not work. Unfortunately, the contingency plans are often impractical or insufficiently developed. _____ would make better decisions and be prepared to respond more rapidly when problems occur if he/she created plans that included more feasible options.

❖ **Participates in team problem solving:**

_____ actively participates in team problem solving efforts. He/she contributes insightful ideas and helps facilitate the process by supporting the exchange of ideas and information among all team members.

_____ usually participates in team problem solving efforts. He/she contributes solutions as well as suggestions for facilitating the process.

_____ sometimes participates in team problem solving efforts. He/she would be a more effective member of the team if he/she were more consistent in contributing solutions and suggestions.

_____ seldom contributes to team problem solving efforts. As a result, the other group members do not view him/her as a valuable. _____ would be a more effective member of the team if he/she assumed a more active role in the group's problem solving activities.

Productivity:

❖ Manages a fair work load in comparison to peers:

_____ is a highly productive contributor in his/her group. He/she works efficiently and volunteers to take on extra assignments when necessary. _____ routinely carries a heavy work load and is always careful to meet his/her commitments.

_____ is viewed as one of the most productive contributors on his/her team. He/she is skilled at handling several projects at a time. _____'s ability to manage several assignments at one time saves the company money in additional staff and management, making him/her extremely valuable to this department.

_____ is a conscientious and competent worker who generally manages his/her fair share of the work load. He/she is viewed as a solid contributor to team efforts.

_____ is a competent worker who sometimes needs prompting from coworkers to manage his/her fair share of the work load. _____ would be viewed as a stronger team player if he/she made sure he/she was contributing equally.

_____ is sometimes viewed by other team members as being unproductive. As a result, there is a perception that he/she is not handling his/her fair share of the work load. By being more conscientious in doing his/her job, _____ would be perceived as a more responsible team member.

_____ sometimes does not complete his/her work on time. As a result, he/she disrupts the work of other team members who must pitch in and help him/her complete his/her work.

_____ needs to be more conscientious in handling his/her fair share of the work load.

_____ does not respond well to increases in work load. He/she tends to push new work off on other group members. As a result, team members feel he/she is not assuming his/her fair share of the work load. By being more responsible in taking on additional work when necessary, _____ would be viewed more positively by his/her group.

❖ Assumes responsibilities beyond scope of normal work duties:

_____ approaches his/her work with energy and enthusiasm. When he/she sees tasks that need to be done, even when they are above and beyond the scope of his/her normal work

duties, he/she does them without being asked. He/she does whatever is necessary to complete his/her work successfully.

_____ readily volunteers for tasks above and beyond the scope of his/her normal work duties. If necessary, he/she reorganizes his/her prior commitments and makes the necessary adjustments to effectively proceed with new assignments.

_____ competently performs his/her normal work duties. He/she is generally cooperative when special circumstances require that he/she take on additional work.

_____ is generally a competent employee. He/she infrequently volunteers to assume additional responsibilities beyond his/her normal work duties. As a result, he/she is not always viewed as a strong team player.

_____ seldom volunteers to assume additional responsibilities beyond his/her normal work duties. As a result, he/she is not viewed as a strong team player. By being more willing to accept additional responsibilities, _____ would be viewed as a stronger and more capable contributor.

_____ will occasionally assume additional responsibilities beyond his/her normal work duties. However, he/she accepts these responsibilities reluctantly and sometimes complains about the added work. His/her behavior does not show that he/she is a willing team player. _____ would be viewed as a stronger contributor if he/she were more positive and showed greater flexibility when asked to do additional work.

_____ resists taking on responsibilities beyond the scope of his/her normal work duties, even when it is clear that the tasks are important. As a result, he/she is not viewed as carrying his/her fair share of the workload. _____ could overcome this perception by being more willing to accept additional responsibilities.

❖ **Establishes and manages priorities effectively:**

_____ is careful to prioritize his/her tasks and where appropriate, reserves the most time for the most important ones. As a result, he/she is able to clearly focus on what he/she needs to accomplish and does so efficiently.

_____ is usually effective at setting priorities. He/she also has the ability to make accurate estimates of the time required to complete a task.

While _____ is usually effective at accomplishing his/her job, he/she sometimes fails to set priorities for his/her work. _____ would be more productive and experience fewer problems if he/she established clearer priorities for his/her work.

_____ does not set priorities for his/her work and sometimes spends too much time on projects that are not important. When this happens, he/she runs the risk of allocating his/her time inefficiently and sometimes finds him/herself with insufficient time to handle critical tasks.

_____ would be more productive and experience fewer problems if he/she established clearer priorities for his/her work.

_____ makes an effort to prioritize his/her work but sometimes doesn't use good judgment when aligning his/her priorities with the team's overall objectives. As a result, he/she

focuses on projects that are not crucial to the group's success. _____ should work more closely with his/her manager to make sure he/she understands the group's priorities and then rests his/her priorities to match them.

❖ **Organizes work to improve output and minimize rework:**

_____ is excellent at analyzing the procedures necessary to complete his/her work and then organizing them efficiently. He/she pays attention to detail and as a result, his/her work is accurate and seldom needs rework.

_____ takes the time to plan ahead and organize his/her work. When appropriate, he/she develops systems that contribute to greater efficiency and fewer errors. He/she has an excellent reputation as a thorough and productive contributor.

_____ usually organizes his/her work efficiently. He/she pays attention to detail and as a result, his/her work is generally accurate and seldom needs rework.

_____ generally organizes his/her work to improve output and minimize rework. However, he/she sometimes rushes ahead without careful planning. When this occurs, his/her efficiency decreases and his/her attention to detail suffers.

_____ doesn't always take the time to analyze or organize his/her work. As a result, he/she sometimes completes tasks in an inefficient order. _____ would be more productive if he/she took the time to plan and organize his/her work.

While _____ attempts to organize his/her work efficiently, he/she frequently does not pay close attention to detail. As a result, he/she makes errors and the time he/she spends correcting errors reduces his/her output. _____ would be more productive if he/she paid more attention to detail when organizing his/her work.

Quality:

❖ **Shows attention to detail, accuracy, and thoroughness:**

_____ consistently demonstrates his/her commitment to quality. _____ is very thorough and accurate and he/she pays close attention to detail in his/her projects.

_____ is generally very thorough and produces good quality work. He/she pays attention to details and performs with accuracy and effectiveness.

While _____ is generally thorough and produces good quality work, he/she has sometimes shown a lack of attention to detail and accuracy in his/her work.

_____ has often shown a lack of attention to detail and accuracy in his/her work. As a result, the quality has suffered. _____ would produce higher quality work if he/she were more thorough and paid closer attention to details.

❖ **Shows a commitment to quality and excellence:**

_____ has demonstrated an exceptional commitment to quality and excellence. He/she is always looking to improve whatever he/she is doing and the quality of his/her work has consistently exceeded expectations.

_____ shows a commitment to quality and excellence. His/her work has consistently met the company's quality expectations.

While _____ generally shows a commitment to quality and excellence, he/she has on occasion produced work that did not meet the company's quality standards.

_____ produces average or below average work. He/she has shown little commitment to the company's quality standards. _____ needs to focus on suggesting new ways to meet requirements and improve quality.

❖ **Looks for and makes continuous improvements:**

_____ always looks for and makes continuous improvements in key processes, techniques, and procedures. He/she strives to implement state-of-the-art techniques for producing high quality work.

_____ is a diligent worker who looks for ways to make improvements in key processes, techniques, and procedures.

While _____ often looks for ways to improve the way things are done, he/she is sometimes satisfied with the status quo. _____ would be viewed as a more valuable employee if he/she contributed more consistently to quality improvements in key processes, techniques, and procedures.

_____ is usually satisfied with the status quo. He/she seldom looks for ways to improve the way things are done. _____ would be viewed as a more valuable employee if he/she contributed more to quality improvements in key processes, techniques, and procedures.

❖ **Finds the root cause of problems:**

_____ is committed to quality and demonstrates great determination in finding the root cause of problems. As a result, he/she is very effective in

_____ is generally effective at focusing on problems and probing the issues until he/she discovers the root cause. As a result, he/she is usually able to eliminate problems and produce quality results.

_____ is sometimes effective at focusing on problems and probing the issues until he/she discovers the root cause. At other times he/she has difficulty in eliminating problems and the quality of his/her work suffers.

_____ has difficulty discovering the root cause of problems. As a result, he/she is often ineffective at eliminating problems and the quality of his/her work suffers. _____

would be more successful if he/she were more persistent and insightful in searching out the root cause of problems he/she encounters.

Responsiveness to Constituents

❖ Builds constituent confidence:

_____ very effectively builds constituent confidence by listening to needs and concerns and addressing them with great diligence. _____ always makes sure that constituents have a full understanding of what they may expect from him/her and then follows up very conscientiously on his/her commitments.

_____’s thorough knowledge of the company’s policies, procedures, and products has enabled him/her to rapidly build his/her constituents’ confidence in him/her and his/her ability to serve their needs.

_____ is generally effective in building constituent confidence. He/she follows through on requests, communicates information, and provides solid solutions to customer problems.

_____ is generally effective in building constituent confidence due to his/her considerable knowledge of the company’s policies, procedures, and products.

_____ has difficulty building constituent confidence. He/she is knowledgeable about the company’s policies, procedures, and products, but frequently fails to follow through on his/her commitments. _____ would be more effective with constituents if he/she improved his/her reliability.

_____ has difficulty building constituent confidence due to his/her lack of knowledge of the company’s policies, procedures, and products. _____ would be more effective with constituents if he/she increased his/her job knowledge.

❖ Takes ownership when solving problems:

_____ takes ownership when solving constituent problems. He/she is careful to listen to constituents’ needs and requirements before making decisions. He/she always follows through to make sure that his/her solutions are the best fit for his/her constituents and that they are properly implemented.

_____’s thorough knowledge of the company’s policies, procedures, and products allows him/her to solve constituent requests with very little guidance from his/her manager.

_____ takes the initiative to research problems on his/her own and finds creative and sound solutions.

_____ usually takes ownership when solving constituent problems. However, on occasion, he/she relies on others’ initiative to find solutions and follow them through to completion. _____ would be a more effective contributor if he/she took more initiative and responsibility in problem solving.

_____ seldom takes ownership when solving problems. He/she relies on the initiative of others to find solutions and follow them through to completion. As a result, he/she lowers the productivity of the entire group since others must spend time on his/her tasks in order to meet constituents' needs. _____ would be a more effective contributor if he/she took more initiative and responsibility in problem solving.

❖ **Ensures commitments to constituents are met:**

_____ always ensures that commitments to constituents are met. He/she follows up on requests, communicates information to constituents, and make everyone feel that they are his/her top priority.

_____ is generally reliable in following through on commitments to constituents. He/she is sensitive to the need for good communication and meets commitments in a timely manner.

While _____ is generally reliable I dealing with constituents, he/she sometimes fails to follow up to make sure that commitments are met. This affects his/her credibility and the company's reputation. _____ needs to make follow through on commitments a top priority.

_____ seldom follows up to make sure that commitments to constituents are met. As a result, his/her credibility and the company's reputation have suffered. _____ needs to make follow through on commitments a top priority in order to improve his/her job performance.

❖ **Solicits opinions and ideas from constituents:**

_____ actively solicits opinions and ideas from constituents. As a result, he/she builds excellent rapport with them and creates solutions that meet their needs. He/she has an outstanding reputation with constituents.

_____ usually solicits opinions and ideas from constituents and uses these to create solutions that meet their needs. Constituents generally feel he/she provides them with very good service.

_____ is sometimes inconsistent in soliciting opinions and ideas from constituents. _____ needs to make sure he/she makes getting input an integral part of any constituent interaction.

_____ seldom solicits opinions and ideas from constituents. As a result, the solutions he/she finds for their problems are often inadequate and they are frequently dissatisfied with his/her service. _____ would b more effective if he/she realized the value of constituents' input and made it an integral part of any constituent interaction.

❖ **Responds to both internal and external constituents:**

_____ responds actively and sensitively to the needs of internal and external constituents. Not only is _____ dependable, but he/she frequently goes beyond the scope of his/her job description to make sure constituents are served.

_____ is generally responsive to the needs of both internal and external constituents. He/she is viewed as a solid contributor to his/her group's efforts.

_____ generally responds to internal and external constituents. However, on occasion, he/she is sometimes unresponsive to their needs. _____ would be more effective if he/she were more consistent in responding to constituent needs.

❖ **Responsive to suggestions from internal constituents:**

_____ is very responsive to suggestions from internal constituents. He/she helps create a cooperative and productive atmosphere by being an excellent example of how to work collaboratively across departmental lines.

_____ is generally responsive to suggestions from internal constituents. He/she is sensitive to other viewpoints and works well on shared issues and problems in a collaborative situation.

While _____ is generally responsive to suggestions from internal constituents, he/she has occasionally been insensitive to other viewpoints. He/she could create a more productive atmosphere by showing greater acceptance of other viewpoints when working in a collaborative situation.

_____ is frequently unresponsive to suggestions from internal constituents. As a result, he/she misses opportunities for implementing many good ideas and is often viewed as a hindrance by others outside his/her department. _____ could contribute to a more cooperative and productive environment by making an effort to work more collaboratively.

Teamwork

❖ **Works effectively in groups:**

_____ is effective working in groups with almost anyone. He/she is respected for his/her openness and candor. When he/she is part of a group, he/she keeps everyone focused without dominating the discussion.

_____ has an easygoing, warm manner that puts people at ease. He/she readily exchanges ideas and information with all team members. He/she works smoothly regardless of who is in the group.

_____ is generally effective working in groups. He/she shares ideas and information with team members, working well with the entire group.

_____ is usually effective in group problem solving settings but is occasionally critical of ideas offered by other team members. He/she can improve the comfort level of team members and be a stronger contributor by showing greater sensitivity to other viewpoints.

_____ sometimes works effectively with team members. However, at time, he/she can become vehement in expressing his/her opinions which creates distance between him/herself and others. _____ can create more productive problem-solving situations by toning down his/her personal feelings and showing that he/she is open to other viewpoints.

_____ is frequently ineffective working with others in a group because he/she seldom accepts ideas that are not his/her own. As a result, team members often avoid him/her and he/she is left out of the group's flow of information. _____ would be viewed as a more valued team member and could assume a more active role in team problem solving by being more tolerant of different views.

_____ is seldom effective working in a group. He/she rarely interacts or makes contributions while in a group. As a result, the other group members do not view him/her as a valuable team member. _____ would be more effective as a team player if he/she assumed a more active role in the group's operations.

❖ **Resolves team conflicts:**

_____ is very diplomatic and handles conflicts well. He/she often anticipates group and interdepartmental problems that are about to arise and takes the necessary steps to avert them.

_____ is an active facilitator in team meetings. He/she elicits ideas from less vocal team members. _____ makes sure divergent views get heard and is effective in resolving conflicts.

_____ is generally effective in resolving team conflicts. He/she usually makes sure all sides are heard and strives to remain objective.

_____ does not always remain objective when team conflicts occur. He/she has occasionally taken sides or attempted to place blame. _____ would be more effective in resolving conflicts if he/she played a more active role in reconciling group conflict.

❖ **Works with other departments:**

_____ 's dealings and communications with other groups have been outstanding. He/she works hard to foster good relations across departments. He/she maintains friendly contacts and keeps up with issues of common concern.

_____ works well with other departments. He/she tries to maintain friendly contacts and keep up with issues of common concern.

_____ works well with other departments. However, he/she occasionally misses opportunities to share resources and coordinate plans and efforts.

_____ is perceived as overly critical of departments and individuals outside his/her group. By repeating or amplifying negative views of people outside the group, he/she

contributes to an "us vs. them" attitude. _____ could produce a more team-oriented environment by offering constructive ideas and making an effort to work more collaboratively with other departments.

_____ is often so keenly focused on his/her own department's work that he/she ignores other departments and misses opportunities to join forces with them on common issues.

_____ would improve productivity by leveraging the efforts of other departments through more regular and deliberate cross-departmental communication.

❖ **Assumes responsibility for solving team problems:**

_____ readily assumes responsibility for solving the team's problems. He/she is usually available to help other members when they experience obstacles and quick to acknowledge the contribution of other members.

_____ is generally committed to the concept of team problem solving. He/she understands the interdependence between his/her own actions and the overall team effort and usually puts the good of the team above his/her own.

_____ sometimes lacks concern for team problems especially if he/she is satisfied with his/her own personal progress. As a result, other team members are not always able to rely on him/her. _____ would build increased trust within the team as well as demonstrate his/her leadership skills by taking a more active role in solving team problems.

_____ takes little responsibility for resolving team problems internally. He/she is too quick to escalate group issues to his/her manager or department. As a result, other team members view him/her as impatient and not loyal to the team. Other team members would trust _____ and feel more connected to his/her efforts if he/she were more patient in resolving team problems internally.

Team members believe _____ does not take responsibility for solving team problems. Because of his/her attitude, there is little exchange of information between _____ and the rest of the team. By focusing on becoming a responsible and accountable team member, _____ could regain the confidence of his/her team members.

❖ **Contributes to professional development of team members:**

_____ actively contributes to the professional development of other team members. He/she takes the time to help and willingly shares his/her knowledge and expertise with them. They look to him/her as an important resource.

_____ is often helpful in the professional development of fellow team members by sharing his/her knowledge and expertise with them.

While _____ sometimes shares his/her expertise or knowledge with fellow team members, he/she could be more consistent in contributing to the professional development of other team members.

_____ seldom shares his/her expertise or knowledge with fellow team members. As a result, his/her coworkers often perceived him/her as being uncommitted to the team. _____ would be more effective if he/she made a greater effort to contribute to the professional development of other team members.

❖ **Supports team members:**

_____ is always supportive of other team members. Whenever he/she is available and capable of assisting them, he/she willingly helps out.

_____ has shown willingness to support other team members. He/she usually assists them when he/she has time and the necessary knowledge to help out.

While _____ sometimes assists team members when he/she has time and the necessary knowledge to help out, he/she has occasionally been perceived as being unsupportive.

_____ would be more effective if he/she made a greater effort to be more supportive of his/her team members.

_____ is frequently perceived as being unsupportive. Even when he/she has available time and the knowledge needed to assist a coworker, he/she usually limits him/herself to actions which benefit him/herself. _____ would be more effective if he/she made greater effort to be more supportive of his/her team members.

Work Environment/Safety

❖ **Helps maintain an enjoyable, challenging, and productive work environment:**

_____ is instrumental in maintaining an enjoyable, challenging, and productive work environment. He/she is viewed as a key contributor to the high morale and success of his/her team.

_____ helps maintain an enjoyable, challenging, and productive work environment. He/she is a solid team player.

While _____ usually helps maintain an enjoyable, challenging, and productive work environment, he/she has occasionally shown a disregard for the morale and productivity of his/her team.

_____ is sometimes a negative influence. On occasion he/she has shown a disregard for the morale and productivity of his/her team. _____ must begin to contribute to making the work environment enjoyable, challenging and productive.

❖ **Keeps the workplace safe, clean, uncluttered, and free of hazards:**

_____ pays close attention to his/her work environment and is very conscientious about keeping it safe, clean, uncluttered, and free of hazards.

_____ generally pays attention to his/her work environment and keeps it clean and uncluttered. He/she is sensitive to workplace safety issues, taking care to correct any potentially hazardous situations when he/she notices them.

_____ pays little attention to his/her work environment. It is often in disarray. He/she sometimes ignores potentially hazardous situations, assuming others will take responsibility for a safe workplace. _____ just immediately begin to take responsibility for keeping the workplace safe, clean, uncluttered, and free of hazards.

❖ **Courteous to others and promotes mutual respect:**

_____ is thoughtful and courteous towards others. He/she is sensitive to other viewpoints and helps promote an open atmosphere of mutual respect. _____ is an important contributor to the morale and success of his/her team.

_____ is generally courteous to others and open to their ideas. As a result, he/she has helped promote an atmosphere of mutual respect in his/her work environment.

While _____ usually helps promote an atmosphere of mutual respect in his/her work environment, he/she has occasionally been inconsiderate of others.

_____ is often inconsiderate of others. He/she need to work on creating an atmosphere of mutual respect and tolerance within his/her group. _____ would be viewed as a more positive contributor if he/she were more courteous and respectful of others.

❖ **Supports safety programs as appropriate:**

_____ is thoroughly versed in the company's safety programs and is very committed to supporting them. He/she is an excellent role model for others in this respect.

_____ has a good understanding of the company safety programs and is usually conscientious about supporting them.

_____ has on occasion placed coworkers at risk by his/her disregard of safety programs. _____ must immediately become thoroughly familiar with all aspects of the programs and must begin applying them when appropriate.

Overall Performance:

_____ is an exemplary performer. He/she shows unusual initiative, is a self-starter, and once given a task, can be depended upon to carry it through to completion. He/she works quickly, remains closely focused on what he/she is doing, and is very productive. _____ is very knowledgeable in his/her field and his/her colleagues seek his/her advice and respect his/her opinions. He/she works effectively within his/her own group as well as throughout the entire organization. _____ has an excellent command of decision-making and problem-solving techniques and can apply them appropriately. His/her performance is well beyond what is expected or required for the position he/she holds.

_____ exceeds the requirements for the position, even on some of the most difficult and complex parts of the job. He/she knows the operations of the group and is ready to pitch in and take on extra tasks where needed. He/she is reliable, and once started on a task, he/she rarely needs prompting and can usually be depended upon to carry it through to completion. He/she is a solid performer who can be relied upon to use good judgment, pick a satisfactory approach, and proceed with few errors. The following next steps are recommended for _____:

_____ is a satisfactory performer. He/she usually completes regular work projects on schedule. He/she is competent in solving problems and making decisions. _____ is generally effective working within his/her own group as well as within the entire organization. In summary, the following improvements are recommended:

_____ meets the minimum requirements for the position. He/she does the job, but often requires regular prompting and follow-up. _____ sometimes falls behind and requires help from others in the group. He/she is having difficulty performing up to expectations in his/her present position. In summary, _____ needs to make improvements in the following areas:

_____ is not able to keep up with normal work requirements, even under close supervision and prompting. While he/she can perform some tasks adequately, he/she sometimes makes inadequate or inappropriate judgment calls. In summary, _____ must make improvements in the following areas:
