

Talent Review and Development Process: A Step-by-Step Guide

Context and introduction

Developing leadership in the home office is one of the most important and valuable things you do as an organization. These central leadership roles are essential for supporting and improving our schools and ensuring students achieve outstanding outcomes. The network depends on each person in the home office working effectively and passionately. Investing in leadership development not only builds your collective skills, but also helps you avoid the challenges of staff turnover and external hiring. Considering the value created and costs averted, this investment in your current and future leaders can yield an impressive return.

Each person in the home office has a role to play in strengthening our leadership pipeline. While leadership development should be happening in some form all the time, this guide focuses on the formal processes that orient year-round activities to develop and retain staff. This formal process, which should take place once a year, is known as the Talent Review and Development Process. To complete the process, you will fill out individualized assessments for each direct report and an individualized development plan that includes specific actions to support on the job training, coaching, formal training, and specific retention strategies (e.g., shifts to compensation, career advancement, and non-monetary rewards).

Individual assessment template

Summary assessment document

Name of supervisor: _____ Role: _____ Review period: _____

Name of supervisee: _____

Any responsibilities during review period: _____

Summary message: _____

Demonstrated performance

Functional competency #1:	Functional competency #2:	Functional competency #3:
Identify strengths demonstrated in each area		
Identify development areas demonstrated in each area		

Leadership potential

Strategic management	Effective learning	Self-management	Leadership values
Identify strengths demonstrated in each area			
Identify development areas demonstrated in each area			

Leadership aspiration: _____

Overall assessment

DEMONSTRATED JOB PERFORMANCE <input type="checkbox"/> Inconsistently delivers work up to required standards <input type="checkbox"/> Current role does not provide an ideal fit; not likely to be a strong candidate for more senior roles	<input type="checkbox"/> Consistently delivers what would be expected from someone in this role <input type="checkbox"/> Current role provides a good fit; may be ready to assume roles with larger scope and responsibility in the future	<input type="checkbox"/> Consistently delivers outstanding work. One of the strongest professionals in this role you have worked with <input type="checkbox"/> eager and able to assume roles with larger scope and responsibility
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Development plan template

70/20/10 Development Plan

Name of supervisor: _____ Role: _____

Name of supervisee: _____

Skill to develop	On-the-job assignments (70%)	Coaching / mentoring (20%)	Formal training / self-study (10%)
1.		1.	1.
2.		2.	
3.			

Employee value driver

Career advancement: _____

Non-monetary rewards: _____

Compensation: _____

Internal offer for this person

This guide will walk you through the key phases of the Talent Review and Development Process and the steps that you can take in each phase to ensure a high-quality development experience for your direct reports.

Our Talent Review and Development Process is based on six best practices in leadership development:

BEST PRACTICES GUIDING THIS PROCESS	EXPLANATION
Defined, role-specific competencies	<ul style="list-style-type: none"> • A set of shared competencies for hiring, performance evaluations, and professional development. • Ensures that development areas are not arbitrary, but are aligned to the functional role and/or necessary leadership skills of the employee.
Development plans anchored in on-the-job stretch opportunities	<ul style="list-style-type: none"> • The Center for Creative Leadership pioneered the 70-20-10 approach, which has three times more impact on employee performance. • Focuses 70% of development on on-the-job training, 20% on coaching and mentoring, and 10% on formal training and self-study.
Co-creation/Joint Accountability	<ul style="list-style-type: none"> • Both the manager and the employee invested in the design and creation of the plan leads to higher engagement, higher job satisfaction, and an increased likelihood of follow through.
Clear measures of Success	<ul style="list-style-type: none"> • Measures of success are clear, measurable goals that will be reached once the professional development plan is complete (i.e. readiness to take on a new responsibility, a new direct report, etc.). • Two types of success measures are key: outcomes based measures and process based measures (i.e. check in once a month around lessons learned, etc.)
Regular reflection and updating	<ul style="list-style-type: none"> • In order to build habit and make this a priority, progress checkpoints must happen consistently throughout the implementation of the plan. • Ensures accountability and allows for problem solving, coaching, and feedback.
Connection to year-end evaluation	<ul style="list-style-type: none"> • Ensures that development areas not arbitrary, but are aligned to the organizations' strategic priorities and the priorities for this specific role. • Connecting the plan to the qualitative and quantitative metrics used to assess performance of employee allows for increased focus, investment, and follow through.

Key phases of the Talent Review and Development Process

1. **Individual Assessment:** Using objective criteria, assess your direct reports' demonstrated job performance and demonstrated leadership potential to form a holistic view of how well they are positioned for future leadership opportunities
2. **Management Team Calibration:** Discuss individual assessments with colleagues to ensure consistent and fair application of performance and leadership potential criteria, to identify themes in development needs, and to coordinate retention investments
3. **Individual Development and Retention Planning:** Translate your assessment into a tailored development and retention plan for each direct report, anchored in on-the-job stretch opportunities and learning
4. **Implementation and monitoring:** Begin with a conversation with your direct report to share your assessment and development plan, and collaboratively outline the next steps you will both take to implement and track progress against the development plan

Phase 1: Individual Assessment

Many organizations in the education field face challenges in identifying and developing their future leaders, filling roles on an ad-hoc basis. To move toward a more robust leadership pipeline in the organization, it is critical to have a rigorous approach for each individual on staff – not just in terms of their performance today, but also in terms of their potential to take on greater leadership responsibility in the future.

During the first phase of the Talent Review and Development Process, you will be asked to evaluate a set of direct reports in terms of both their current performance and leadership potential. This evaluation will help you locate your direct reports on the Performance/Potential Matrix, a tool that can inform the individualized development plans that you create in phase two of the Talent Review and Development Process.

There are two dimensions to the matrix:

- **Demonstrated job performance:** This axis measures the extent to which an individual is meeting expectations in demonstrating function-specific competencies and accomplishing the tasks and responsibilities that are core to their job description.
- **Demonstrated leadership competencies:** This axis measures the extent to which an individual is demonstrating the qualities that would make her or him an excellent and inspiring strategic leader in the organization

Assessments on these two dimensions will help you place each of your direct reports in one of the segments of the Performance/Potential Matrix, shown at right. An individual's placement on the matrix translates directly to an over-arching development goal.

The Talent Review and Development Process is intended to provide an objective set of criteria on both of these dimensions – performance and potential – in order to assess staff members and share consistent expectation across teams, functional groups, and levels within a functional group. These criteria build on the Blueprint for Success Competency Maps developed by EdFuel and Bridgespan. These competency maps provide a comprehensive view of the competencies required for various home or central office roles by function. However, each organization will need to adapt these competencies to fit the unique structure and team configurations of the office. This includes understanding that competencies required for specific roles may cut across differing levels and that some competencies may be less relevant to your context than others.

The criteria on which your team aligns will help you think through specific strengths and development areas for your direct reports, and will help you arrive at an overall assessment and placement on the Performance / Potential Matrix. To simplify the evaluation of your direct reports' demonstration of key competencies,

The Performance / Potential Matrix

DEMONSTRATED LEADERSHIP COMPETENCIES	EXCEEDING EXPECTATIONS	May be new to role; ensure support is available May be in wrong role; consider reassignment	Continue to develop in current role; consider providing test assignment in more senior role	Consider providing significant new assignments or reassign to a more senior role
		May be in the wrong role or at the wrong level; consider providing test assignment in different role	Continue to develop in current role	Gradually expand current role
	NOT MEETING EXPECTATIONS	Consider replacing if support has not improved performance	Continue to develop in current role; periodically reassess potential for growth	Retain in current role; periodically reassess potential for growth
		DEMONSTRATED JOB PERFORMANCE		
		NOT MEETING EXPECTATIONS		EXCEEDING EXPECTATIONS

we have a standard evaluation template, shown below. The next two sections of this guide will walk through the step-by-step process of completing this template.

Summary assessment document

Name of supervisor:

Name of supervisee:

Key responsibilities during review period:

Role:

Review period:

Summary message

+

 Demonstrated performance

Functional competency #1:	Functional competency #2:	Functional competency #3:
Identify strengths demonstrated in each area		
<div></div>	<div></div>	<div></div>
Identify development areas demonstrated in each area		
<div></div>	<div></div>	<div></div>

Leadership potential

+

Strategic management	Effective teaming	Self-management	Leadership values
Identify strengths demonstrated in each area			
<div></div>	<div></div>	<div></div>	<div></div>
Identify development areas demonstrated in each area			
<div></div>	<div></div>	<div></div>	<div></div>
Leadership Aspiration:			

Overall assessment

DEMONSTRATED JOB PERFORMANCE	<div><input type="checkbox"/> Inconsistently delivers work up to required standards</div>	<div><input type="checkbox"/> Consistently does what would be expected from someone in this role</div>	<div><input type="checkbox"/> Consistently delivers outstanding work. One of the strongest professionals in this role you have worked with</div>
DEMONSTRATED LEADERSHIP COMPETENCIES	<div><input type="checkbox"/> Current role does not provide an ideal fit; not likely to be a strong candidate for more senior roles</div>	<div><input type="checkbox"/> Current role provides a good fit; may be ready to assume roles with larger scope and responsibility in the future</div>	<div><input type="checkbox"/> Eager and able to assume roles with larger scope and responsibility</div>

Assessing demonstrated job performance

Demonstrated performance is the ability to consistently deliver results over time aligned with the strategy, goals, and objectives of the individual's functional area. The goal of assessing demonstrated performance is to understand sustained performance in the role over time rather than one specific action or accomplishment. The following set of directions are meant to provide a general guide for evaluating performance based on key competencies identified as part of the Blueprint for Success.

Directions:

1. **Start by briefly listing your direct report's major responsibilities** over the time period of the evaluation. Don't worry about capturing everything – just focus on the biggest assignments, initiatives or bodies of work.

Name of supervisor: [name]

Name of supervisee: [name]

Role: Operations Manager

Tenure in current role: 2.5 years

Review period: 06/15-05/16

Key responsibilities during review period:

- Project-managed structural renovations to two school sites, including budget oversight
- Renegotiated school food service contracts for all school sites in largest district
- Conducted analysis of school utility costs and recommended strategies to cut costs in coming year
- Managed state accreditation process across all school sites

Summary message

- *Leave this blank for now – we'll revisit it later in this section of the guide*

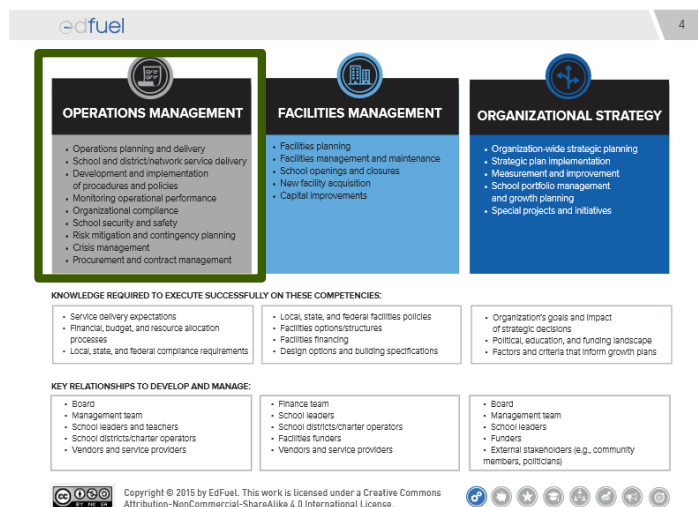
2. **Identify the functional area for which the staff member is being evaluated and choose the competency map that best fits the functional role or roles that the staff member has responsibility for executing.** For example, if the direct report you are evaluating is an operations manager, you would begin by looking at the “Operations” competency map because this is your direct report’s functional area.



3. **Determine the equivalent level of your direct report in the competency map framework.** In identifying where your direct report fits in the sequence of levels in the competency map, it’s more important to pay attention to the descriptions (on the right) rather than the titles, since these can vary across organizations. The current level of your direct report will determine which column of the competency maps you use as the definition for “meeting expectations” in job performance.

COMPETENCY MAP LEVEL	SAMPLE JOB TITLES	DESCRIPTION
Individual Contributor	Operations Associate, Business Analyst, Office Manager, IT Administrator	<ul style="list-style-type: none"> Executes operations tasks within specific, individual workstreams May be focused specifically within one area of operations management (e.g., facilities, IT, food service, security) or may provide analysis and management support across operations departments
Manager	Operations Manager, Strategic Planning Manager, Facilities Manager, IT Manager	<ul style="list-style-type: none"> Leads a team within operations department, overseeing projects and daily activities Typically monitors a project or department budget in addition to team management responsibilities
Senior Manager/ Director	Director of Operations, Director of Strategic Planning, Director of Real Estate, Chief of Staff	<ul style="list-style-type: none"> Leads operations department or multiple teams across the department Sets strategic direction for operations, oversees department budgets, and coordinates with other departments to incorporate organizational priorities into operations planning
Executive/ Officer	Chief Operating Officer	<ul style="list-style-type: none"> Operational leader of the organization and core member of leadership team Leads multiple departments or teams Sets strategy and vision for organization and ensures that organization is positioned to achieve short- and long-term goals Ensures alignment within operations and across the organization to ensure that schools operate successfully on a daily basis

4. **Identify the three competencies that are most important to this person's success in their functional role.** All functional area competency maps have several big categories of competencies, each with more specific sub-competencies. Ideally, you will work with your direct report to identify the big category that is most important for him/her, and then within this category, pick the three most important specific competencies. You can also pick specific competencies from multiple categories. Using these competency maps to identify critical competencies will ensure that job performance assessments – and corresponding development plans – are not arbitrary, but aligned to the functional role of your direct report. As you go through this step, try to keep two goals in mind:
- Use the competency maps as the foundation for ongoing professional development conversations with your direct report, and to continue to build their investment and ownership of their growth.
 - Be as specific as possible about the competencies that your direct report must demonstrate to be an effective performer in his/her current role and level. This will help you both to write clear and powerful assessments and development plans.



edfuel OPERATIONS MANAGEMENT 5

COMPETENCY	INDIVIDUAL CONTRIBUTOR	MANAGER	SENIOR MANAGER/DIRECTOR	EXECUTIVE/OFFICER
FINANCIAL ANALYSIS	<ul style="list-style-type: none"> • Executes operational activities and meets service delivery expectations • Resolves operational issues, elevating larger issues 	<ul style="list-style-type: none"> • Coordinates team efforts across projects to meet service delivery expectations • Manages resolution of operational issues, elevating larger issues 	<ul style="list-style-type: none"> • Plans service delivery and projects requiring multiple processes and teams • Reviews and prioritizes operational issues and guides department to resolution 	<ul style="list-style-type: none"> • Defines operational vision and strategy aligned with organization's strategy • Sets expectations for service delivery in collaboration with school leaders, balancing academic and operational objectives • Ensures resolution of operational issues • Communicates operational health and issues to management team and Board
SCHOOL AND DISTRICT/NETWORK SERVICE DELIVERY	<ul style="list-style-type: none"> • Executes service delivery and coordinates with other teams across school sites (e.g., transportation, food services) • Supports vendor services • Conducts equipment checks, elevating when something requires fixing or upgrading 	<ul style="list-style-type: none"> • Coordinates team's service delivery • Monitors vendor services and gathers and provides feedback to vendors 	<ul style="list-style-type: none"> • Defines workstreams and processes • Delegates services across schools and central office departments 	<ul style="list-style-type: none"> • Ensures coordination and consistent delivery of school and district/network services • Decides which services should be provided centrally
DEVELOPMENT AND IMPLEMENTATION OF PROCEDURES AND POLICIES	<ul style="list-style-type: none"> • Implements operating procedures and policies 	<ul style="list-style-type: none"> • Guides implementation of operating procedures and policies and recommends opportunities to update 	<ul style="list-style-type: none"> • Develops operating procedures and policies • Develops a cycle of continuous improvement for procedures and policies • Ensures written policies are kept current in the face of changing practices and that all staff are regularly trained 	<ul style="list-style-type: none"> • Ensures organization has operating procedures and policies that meet local, state, and federal policies • Develops a cycle of continuous improvement for procedures and policies • Ensures written policies are kept current in the face of changing practices and that all staff are regularly trained

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5. **Fill in the template with the with the functional competencies that you feel are most important** to the success of the functional area and the organization as a whole

Functional competency #1: Financial analysis	Functional competency #2: Monitoring operational performance	Functional competency #3: Organizational compliance
Identify strengths demonstrated in each area		
Identify development areas demonstrated in each area		

6. **Using the specific definitions provided in the competency maps at your direct report's level, reflect on your direct report's demonstrated performance of these competencies.** When evaluating an employee's performance, consider any significant accomplishments over the last year, any notable achievements or recognition that the person has received, and any moments of performance related problems that have been observed. Try to recall specific examples of times when they were exercising each skill listed in the competency map. The aim for each competency is to highlight a few of your direct report's specific strengths and specific areas for improvement.


Ensuring objectivity in the individual assessment: Although this may seem like a very subjective evaluation, you are strongly encouraged to bring as much objective rigor to the process as possible. The specific criteria spelling out the definitions of demonstrated job performance and demonstrated leadership competencies below will help you to be consistent and fair in your assessments. As you review these criteria, you should focus on the individual's recent *demonstrated behavior*, not their *reputation* or *what others say about him/her*.

You are also encouraged to watch out for common pitfalls in individual assessment. Some of the major biases to avoid include:

Bias	Description	Tips on mitigating these biases
Halo effect	Developing an overall appraisal based on one good (or bad) trait	<ul style="list-style-type: none"> • Consider all of the key competencies separately when assessing an individual • Seek out other supervisors to provide examples / anecdotes about the individual to check your perception • Base your assessment on concrete examples of their behavior • Draw examples of an individual's behavior from the entire time relevant time period • Meet with your colleagues to calibrate your assessments (<i>note: this is phase 3 of the Talent Review and Development Process</i>) • When discussing your assessment with others (including direct reports), be open to making changes
Personal bias	Basing your assessment about the individual primarily on your personal feelings about her/him, not the objective criteria	
Similar-to-me bias	Assessing an individual more favorably because she/he is very similar to you	
Recency bias	Assessing an individual based on her/his actions in the very recent past rather than over the entire relevant time period	
Harshness / leniency bias	Consistently rating individuals more positively or negatively than colleagues	

Functional competency #1: Financial analysis	Functional competency #2: Monitoring operational performance	Functional competency #3: Organizational compliance
Identify strengths demonstrated in each area		
<ul style="list-style-type: none"> Coordinated effectively with two different contractors and school site teams to develop budgets for school renovation Proactively elevated potential renovation cost over-runs 	<ul style="list-style-type: none"> Successfully managed a junior staff member and summer intern to deliver utility cost analysis ahead of deadline Identified extended learning time as key driver of variance in utility costs, informing new pricing model for external afterschool providers 	<ul style="list-style-type: none"> Oversaw on-time completion of accreditation compliance reports for all school sites
Identify development areas demonstrated in each area		
<ul style="list-style-type: none"> Could have done a better job of including key stakeholders on food service team throughout contract renegotiation to ensure there would be no compromise in service quality 	<ul style="list-style-type: none"> Future recommendations for operational improvement (like cutting utility costs) could go deeper in anticipating key risks/challenges and potential approaches for mitigating these risks 	<ul style="list-style-type: none"> Could provide more regular (ie monthly) updates to supervisor on operational compliance to initiate necessary corrective action earlier

7. **After thinking through each of the competency sets, make a holistic assessment about demonstrated job performance:** Overall, is this person meeting expectations, exceeding expectations, or not meeting expectations for their level?

DEMONSTRATED JOB PERFORMANCE	<input type="checkbox"/> Inconsistently delivers work up to required standards	<input checked="" type="checkbox"/>  Consistently does what would be expected from someone in this role	<input type="checkbox"/> Consistently delivers outstanding work. One of the strongest professionals in this role you have worked with
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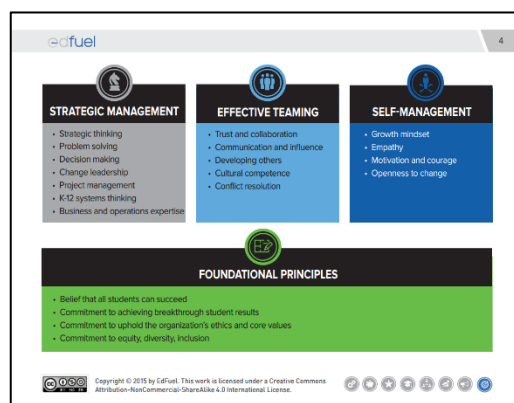
Assessing demonstrated leadership potential

Leadership potential reflects the perceived ability of an individual to assume leadership roles within the organization. Attributes of leadership potential include the ability to strategically manage resources and support the organization to achieve its mission, the ability to effectively engage team members within one's functional area and beyond in achieving goals, and the ability to manage oneself in a way that provides confidence that s/he can assume greater levels of responsibility without being overstretched.

In addition to these attributes—which are detailed in the leadership competency map—assessing the leadership potential of a staff member should also take into account the degree to which that person embodies the values of the organization and aspires to take on greater responsibility. To truly assess these qualities, it is important to have feedback from other team members who have worked with this individual and to have open conversations with the individual about their aspirations and long term goals. The following set of directions are meant to provide a general guide for evaluating leadership potential based on leadership competencies identified as part of the Blueprint for Success.

Directions:

1. **Open the Blueprint for Success competency map for Strategic Leadership, and read through the description of key competencies for the four major categories of “strategic management,” “effective teaming,” “self-management,” and “foundational principles”**



Strategic Management				
Competency	Individual Contributor	Manager	Senior Manager/Director	Executive Officer
Strategic Thinking	<ul style="list-style-type: none"> Conducts research and analysis to inform insight Connects work to organization's larger strategy 	<ul style="list-style-type: none"> Conducts research to surface insights from multiple sources Contributes perspectives to strategic development Translates plans into team priorities and activities 	<ul style="list-style-type: none"> Translates strategy into actionable plans and initiatives, and drives effective allocation of resources Draws insight from multiple sources to shape vision and strategy 	<ul style="list-style-type: none"> Sets vision, goals, and strategy Defines objectives and formulates clear priorities Aligns resources to meet needs of highest impact Promotes rigorous use of data, analysis, and experience to shape vision and strategy
Problem Solving	<ul style="list-style-type: none"> Shows initiative in generating ideas and solutions Anticipates risks and alerts manager 	<ul style="list-style-type: none"> Identifies challenges and generates team-based solutions Creates space for productive debate and alternative perspectives Promotes innovation and creativity Identifies risks and ways to mitigate 	<ul style="list-style-type: none"> Applies multiple techniques to develop solutions for organization or department Creates environment that encourages innovation and creativity Takes calculated risks to find right solutions Evaluates solutions with a focus on scale and sustainability 	<ul style="list-style-type: none"> Makes versatility in addressing analysis and strategic issues across the organization Promotes innovation, creativity and responsiveness Takes calculated risks to improve organizational outcomes Resolves challenges with an eye toward what is equitable, scalable and sustainable
Decision Making	<ul style="list-style-type: none"> Performs research and analysis that supports decision making Owns and stands by individual decisions 	<ul style="list-style-type: none"> Makes timely, effective team decisions and aligns team resources accordingly Owns and stands by team decisions 	<ul style="list-style-type: none"> Makes timely departmental decisions, considers implications, and creates conclusions Recommends course of action for organizational decisions informed by research, data, and consistent perspectives of decisions within organization and broader community Owns and stands by department decisions 	<ul style="list-style-type: none"> Makes decisions that drive best outcomes for students Business decisions rapidly and timely, effectively executed, and designed to maximize organizational resources Executes leadership team consensus and/or individual implications of decisions within organization and broader community Holds leadership team accountable for outcomes and progress against them

2. **Reflect on your direct report's demonstration of leadership competencies**, considering any of the sub-competencies in the four major categories. The aim for each of the four competency areas is to highlight a few of your direct report's specific strengths and specific areas for improvement.

When evaluating an employee's performance, consider any significant accomplishments over the last year, any notable achievements or recognition that the person has received, and any moments of performance related problems that have been observed. Try to recall specific examples of times when


they were exercising each attribute listed in the competency map. As with the assessment of job performance, be aware of potential biases in your judgment and try to proactively mitigate these biases.

Strategic management	Effective teaming	Self-management	Foundational principles
Identify strengths demonstrated in each area			
<ul style="list-style-type: none"> • Triangulated several sources of data in analysis of utility costs, considering quantitative data, direct observation and interview/focus group input 	<ul style="list-style-type: none"> • Made good-faith effort to address conflict between building contractor and school site council chair over construction noise, even though the issue was not resolved in a timely manner 	<ul style="list-style-type: none"> • Highly responsive to constructive feedback on working style; quick to incorporate new approaches and techniques 	<ul style="list-style-type: none"> • Spearheaded diversity outreach efforts in internship recruiting
Identify development areas demonstrated in each area			
<ul style="list-style-type: none"> • Could be more proactive in communicating case for change for key initiatives such as new food service contracts 	<ul style="list-style-type: none"> • Could better support entry-level direct reports by providing more structure and direction in deliverables • Could be more intentional in fostering productive team environment; style at times feels too transactional 	<ul style="list-style-type: none"> • Could take a more pragmatic lens in work and think critically about whether solutions proposed are realistic 	<ul style="list-style-type: none"> • Could more explicitly consider/prioritize student outcomes in decision-making (for example, as a lens for recommending approaches to reduce utility costs)

3. **Assess your direct report's expressed aspiration for further leadership positions.** Base your judgment on conversations you have had with your direct report. Aspiration is a term that captures the intensity of an individual's desire for advancement within the organization and personal motivation to improve

Leadership Aspiration: Moderate – Works hard and expresses some enthusiasm about taking on more responsibility within the organization. However, only seldom goes “above and beyond” to achieve best results, and does not seem particularly passionate about the education sector.

4. **After thinking through each of the competency sets, make a holistic assessment about demonstrated leadership potential:** Overall, is this person in the right role? Ready to step up immediately? Or unlikely to be a good fit for more senior roles?

DEMONSTRATED LEADERSHIP COMPETENCIES	 Current role does not provide an ideal fit; not likely to be a strong candidate for more senior roles	<input type="checkbox"/> Current role provides a good fit; may be ready to assume roles with larger scope and responsibility in the future	<input type="checkbox"/> Eager and able to assume roles with larger scope and responsibility
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5. **Complete the “summary message” based on your assessment.**

Summary message


- [Name] has performed up to expectations in his role, showing exceptional analytical ability and some emerging strengths in project management. He is eager to learn, but has significant opportunities to improve in championing change initiatives and engaging with his team and with broader groups of stakeholders.*

6. **Place your direct report on the Performance / Potential Matrix**, based on your holistic assessments on both axes. Confirm that the description in the box feels right for your direct report

NOT MEETING EXPECTATIONS

DEMONSTRATED LEADERSHIP COMPETENCIES

EXCEEDING EXPECTATIONS

<p>May be new to role; ensure support is available</p> <p>May be in wrong role; consider reassignment</p>	<p>Continue to develop in current role; consider providing test assignment in more senior role</p>	<p>Consider providing significant new assignments or reassign to a more senior role</p>
<p>May be in the wrong role or at the wrong level; consider providing test assignment in different role</p>	<p>Continue to develop in current role</p>	<p>Gradually expand current role</p>
<p>Consider replacing if support has not improved performance</p>	<p>Continue to develop in current role; periodically reassess potential for growth</p> 	<p>Retain in current role; periodically reassess potential for growth</p>

NOT MEETING
EXPECTATIONS

**DEMONSTRATED
JOB PERFORMANCE**

EXCEEDING
EXPECTATIONS

Summary assessment document

Name of supervisor:

Name of supervisee:

Role:

Tenure in current role:

Review period:

Key responsibilities during review period:

Summary message

Demonstrated performance

Functional competency #1: _____	Functional competency #2: _____	Functional competency #3: _____
Identify strengths demonstrated in each area		
<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>
Identify development areas demonstrated in each area		
<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>

Leadership potential

Strategic management	Effective teaming	Self-management	Leadership values
Identify strengths demonstrated in each area			
•	•	•	•
Identify development areas demonstrated in each area			
•	•	•	•
Leadership Aspiration:			

Overall assessment

DEMONSTRATED JOB PERFORMANCE	<input type="checkbox"/> Inconsistently delivers work up to required standards	<input type="checkbox"/> Consistently does what would be expected from someone in this role	<input type="checkbox"/> Consistently delivers outstanding work. One of the strongest professionals in this role you have worked with
DEMONSTRATED LEADERSHIP COMPETENCIES	<input type="checkbox"/> Current role does not provide an ideal fit; not likely to be a strong candidate for more senior roles	<input type="checkbox"/> Current role provides a good fit; may be ready to assume roles with larger scope and responsibility in the future	<input type="checkbox"/> Eager and able to assume roles with larger scope and responsibility

Position on Performance/Potential Matrix

DEMONSTRATED LEADERSHIP COMPETENCIES <small>NOT MEETING EXPECTATIONS</small>	May be new to role; ensure support is available May be in wrong role; consider reassignment	Continue to develop in current role; consider providing test assignment in more senior role	Consider providing significant new assignments or reassign to a more senior role
	May be in the wrong role or at the wrong level; consider providing test assignment in different role	Continue to develop in current role	Gradually expand current role
	Consider replacing if support has not improved performance	Continue to develop in current role; periodically reassess potential for growth	Retain in current role; periodically reassess potential for growth
<small>NOT MEETING EXPECTATIONS</small> DEMONSTRATED JOB PERFORMANCE <small>EXCEEDING EXPECTATIONS</small>			