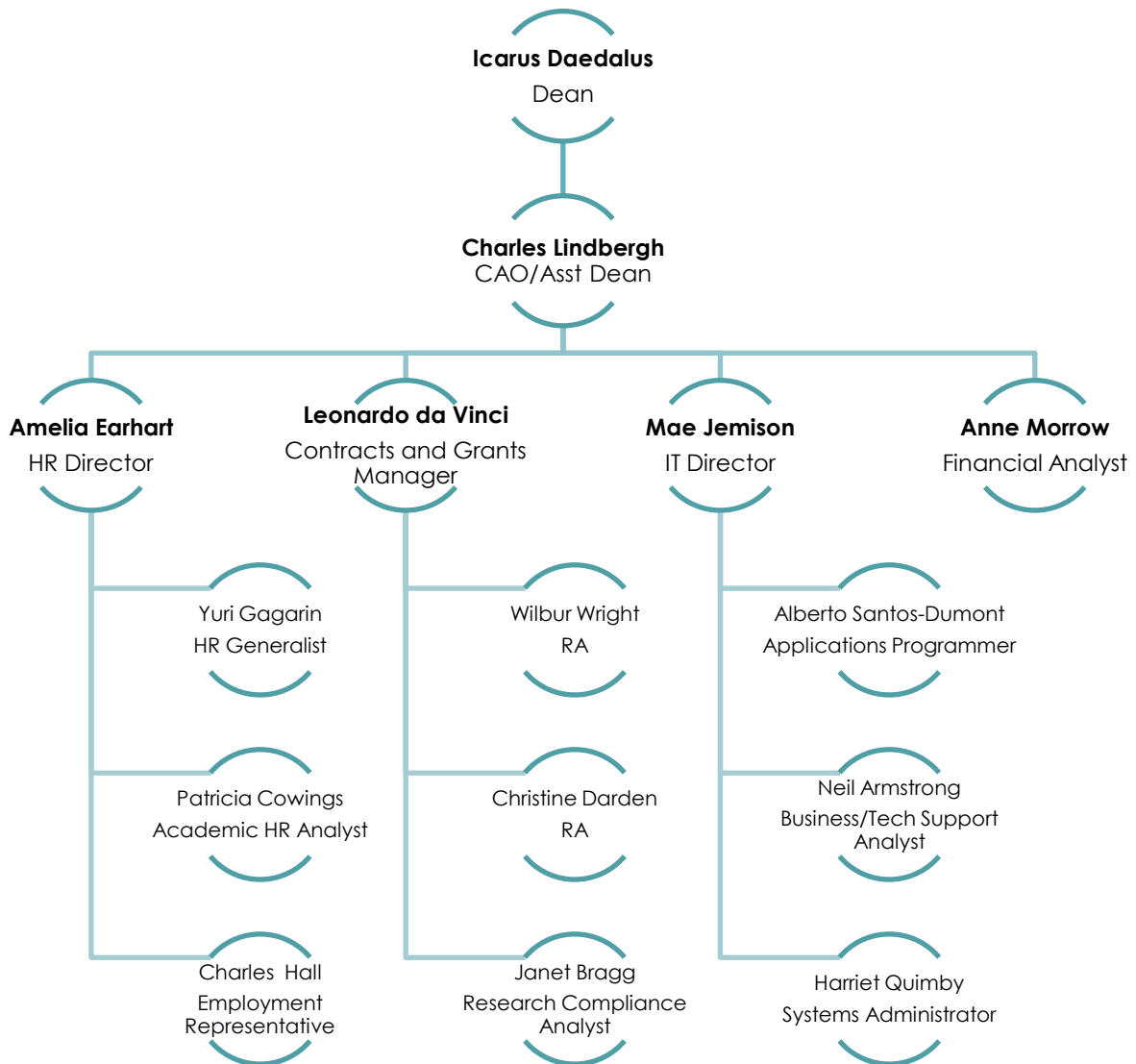


School of Aeronautics Case Study

Part B

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The mission of the School of Aeronautics is to provide an outstanding and accessible education to tomorrow's leaders in aeronautics. Accomplishing this mission isn't without its challenges. There are a variety of challenges including approximately 23% of staff retiring in the next 5 years, a major decrease in state funding, skill requirement changes, antiquated systems, and inefficient processes.



Talent Review Matrix

		SUSTAINED CONTRIBUTION TO THE ORGANIZATION		
		Not Full Performance/ Too New to be at Full Performance	Solid Performance	Exceptional Performance
PROJECTED NEXT JOB LEVEL	Next Level - Promotion to next level	NF/P	S/P	E/P
	Current Level -Expanded- Take on new assignments w/in current job, add new functions or move laterally	NF/E	S/E	E/E
	Current Level - Limited potential for growth beyond current level	NF/C	C	E/C

		Janet Bragg C&G		
			Charles Hall HR	Wilbur Wright C&G
			Alberto Santos-Dumont IT	Christine Darden C&G
		Neil Armstrong IT	Yuri Gagarin C&G	
		Harriet Quimby IT	Patricia Cowings HR	Anne Morrow Finance

Sustained Contribution- Individual Contributors

	Not Full Performance	Solid Performance	Exceptional Performance
<i>Delivered output</i>	<ul style="list-style-type: none"> Is below or minimally meets standard execution of most operating, technical and professional output requirements. 	<ul style="list-style-type: none"> Consistently meets or exceeds all operating, technical, and professional output requirements. 	<ul style="list-style-type: none"> Consistently exceeds operating, technical, and professional output requirements.
<i>Constructive working relationships</i>	<ul style="list-style-type: none"> Achieves results in a way that does not always build and maintain constructive working relationships 	<ul style="list-style-type: none"> Achieves results in a way that usually builds and maintains constructive working relations. 	<ul style="list-style-type: none"> Achieves results in a way that <i>always</i> builds and maintains constructive working relationships with many constituencies including peers and customers.
<i>Time vs output</i>	<ul style="list-style-type: none"> Requires a lot of the manager's time in management. 	<ul style="list-style-type: none"> Is occasionally assigned extra work. 	<ul style="list-style-type: none"> Is usually given the toughest assignments
<i>Desire to retain</i>	<ul style="list-style-type: none"> Would not elicit boss's concern if this person left the organization 	<ul style="list-style-type: none"> Is considered a good performer, but equivalent talent could be found, if needed. 	<ul style="list-style-type: none"> The manager would fight to keep this person.

Potential Next Job Level

		Current Level	Current Level Expand	Promote
Scope of focus	Skill level	<ul style="list-style-type: none"> • On balance, exhibits operating, technical, and professional skills that are acceptable for current organizational level. 	<ul style="list-style-type: none"> • Exhibits operating, technical, and professional skills that are high for current organizational level. 	<ul style="list-style-type: none"> • Exhibits operating, technical, and professional skills that are extremely broad and deep and are expected at the next highest organizational level.
	Skill development	<ul style="list-style-type: none"> • Demonstrates little effort to build new skills, but keeps current skills sharp. 	<ul style="list-style-type: none"> • Adds new skills when the job calls for it. 	<ul style="list-style-type: none"> • Regularly works at building new skills and abilities
	Personal aspirations	<ul style="list-style-type: none"> • Aspires to stay in current role as opposed to assuming bigger challenges or higher personal contributions. 	<ul style="list-style-type: none"> • Aspires to greater challenges but primarily at the same organizational level. 	<ul style="list-style-type: none"> • Aspires to higher level challenges and opportunities.
	Motivation	<ul style="list-style-type: none"> • Is motivated to do what is needed in current job. 	<ul style="list-style-type: none"> • Is motivated to do more than is expected. 	<ul style="list-style-type: none"> • Demonstrates “fire in the belly.”
	Business perspective	<ul style="list-style-type: none"> • Understands the job. • Is focused primarily on technical success. 	<ul style="list-style-type: none"> • Has an organization perspective beyond current position. • Is focused on the success of own area and the team. 	<ul style="list-style-type: none"> • Has an organization perspective beyond current level. • Is oriented toward total business results, not just own area.



Human Resources – Amelia Earhart's Directs



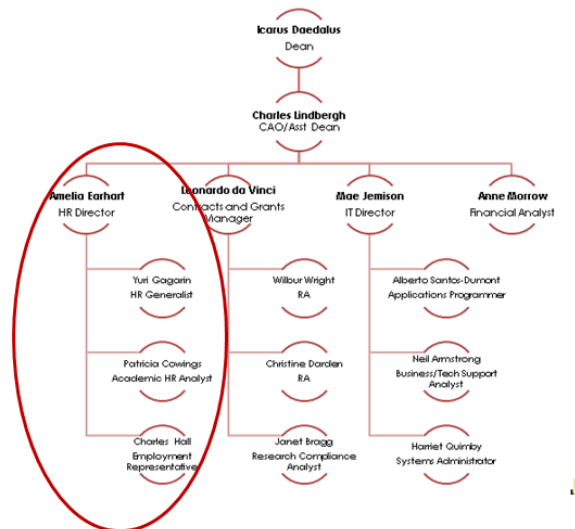
Name: Yuri Gagarin

Title: HR Generalist

Age: 25

Years of Service: 3

Last Annual Performance Review Rating: Meets Expectations



Yuri started his career at the School of Aeronautics as an administrative assistant and was promoted to a HR generalist one year ago. He is excited to be working in HR because he likes the people side of operations. He was promoted largely due to his eagerness in seeking out assignments and projects. Yuri has worked hard at learning the technical side of human resources, attending an HR Certification program through University Extension. He is a go-getter, but can be a bull in a china shop. Yuri is extremely confident, but his confidence and assertiveness is sometimes off-putting to faculty. Yuri is friendly with other staff members and has the ability to get them engaged and motivated about work. Amelia has recently been spending time coaching him on how to deal with the politics of the school, including working with faculty. Yuri has a wonderful sense of humor and spends his free time doing stand-up comedy.

Strengths: Go getter, willingness and desire to learn, enthusiasm, confidence, works well with peers

Development Areas: Continued HR depth, relations with faculty, politics of school (political acumen)

Likely role in 12 months: Still in same role with improved relations with faculty – two years away from expansion into larger role

Departure risk: Low

Focus for next twelve months: Technical knowledge, political acumen, tempering confidence with politics

Human Resources – Amelia Earhart's Directs



Name: Patricia Cowings

Title: Academic HR Analyst

Age: 36

Years of Service: 10

Last Annual Performance Review Rating: Improvement Needed

Patricia transferred from another division to the School of Aeronautics a little over a year ago. Her previous department was sad to see her leave because she led a cross-functional process improvement committee that saved the department over \$250,000. Patricia has good social skills and other team members enjoy working with her. Amelia has found her academic personnel expertise to be very valuable in addressing issues the department has faced. Amelia recruited her to help streamline some of the school's HR processes. Patricia is having a hard time adjusting to a more demanding pace and has missed several critical milestones. She is very process oriented and finds it difficult to be interrupted. She also wants to start taking professional development courses, but is worried that her work will suffer further. Patricia was a dance major and enjoys choreographing routines for local theatre companies.

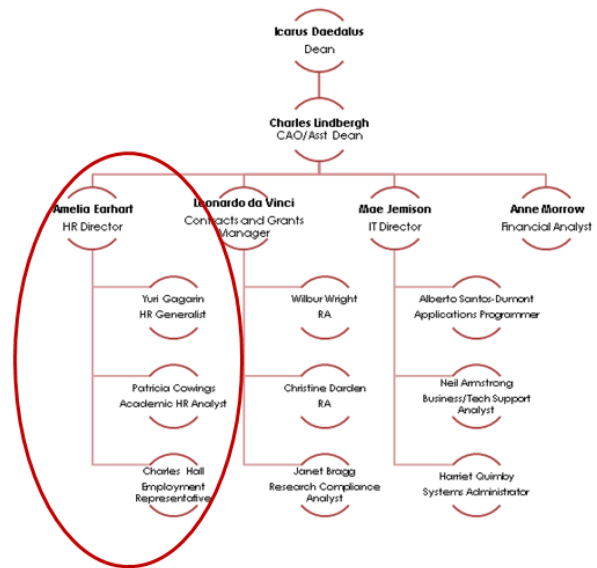
Strengths: Academic personnel knowledge, process improvement

Development Areas: Time & priority management

Likely role in 12 months: Same role with higher performance

Departure risk: Medium in the short term – Patricia has had successes in previous roles, will need it here or she will leave.

Focus for next twelve months: Helping to set priorities and closer milestones to incrementally achieve success and fit with the department





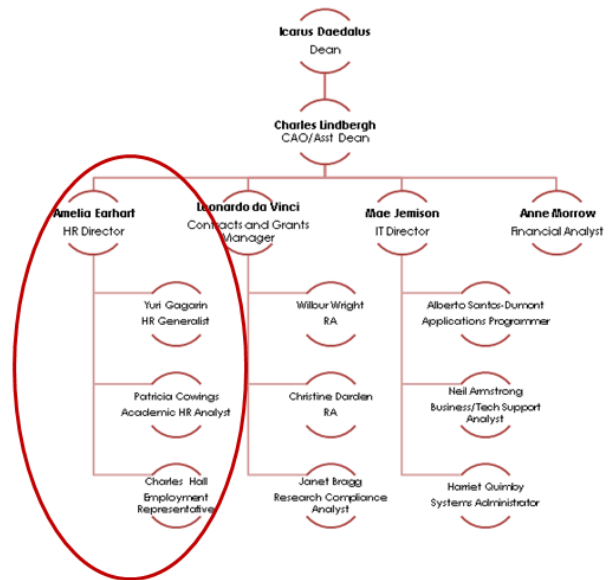
Name: Charles Hall

Title: Employment Representative

Age: 30

Years of Service: 2

Last Annual Performance Review Rating: Exceeds Expectations Charles worked as a Recruiter at Bombardier in Quebec, Canada prior to working at the School of Aeronautics. Charles is upbeat, energetic, and is full of fresh ideas about sourcing new talent for the school. He frequently attends conferences, seminars, and classes to keep abreast of new ways of thinking about human resources and recruiting. Amelia has frequently asked Charles to take on additional assignments, sometimes outside of recruiting. His eagerness to take on new recruitments and projects has led to him set unrealistic deadlines, which he sometimes fails to meet. Charles speaks French fluently and is excited for his upcoming trip to Bordeaux.



Strengths: Recruiting skills, attitude, pursuit of learning

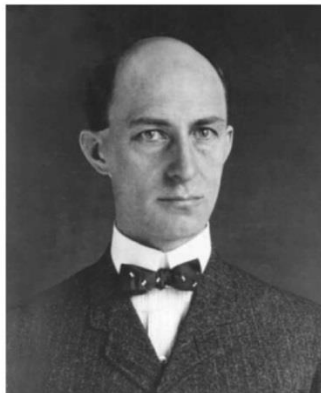
Development Areas: Priority setting, scoping of work

Likely role in 12 months: Existing role, expanding responsibilities

Departure risk: Medium

Focus for next twelve months: Prioritization and capacity scoping of work, determining next career step.

Research - Leonardo da Vinci's Direct Reports



Name: Wilbur Wright

Title: Research Administrator

Age: 58

Years of Service: 16

Last Annual Performance Review Rating: Meets Expectations

Wilbur has been in the same role at the School of Aeronautics for 6 years. He spent the previous 10 years working for the School of Engineering, but decided to get back to the field of aeronautics research. Prior to coming to the university, Wilbur worked at the MIT Aeroastro Research Lab in a similar position. Wilbur has a strong personality and is honest, authentic, and forthright. He is extremely organized, has a vast amount of procedural knowledge, and is well appreciated by the PI's he works with. Wilbur is committed to the research done at the School of Aeronautics. He created the research information management system used by the School of Aeronautics. Wilbur is exceptionally change adverse and feels overwhelmed by the smallest changes. Every summer Wilbur takes three weeks off to visit his family home in Kitty Hawk, North Carolina.

Strengths: Deep technical knowledge, committed to the work, well organized

Development Areas: Dealing with changes

Likely role in 12 months: Same

Departure risk: Future retirement

Focus for next twelve months: Recognition for value to unit, working to deal with specific changes that come along. Potential trainer for other staff?



Research - Leonardo da Vinci's Direct Reports



Name: Christine Darden

Title: Research Administrator

Age: 42

Years of Service: 13

Last Annual Performance Review Rating: Exceptional

Christine has spent 13 in years in research administration at the School of Aeronautics. Her prior work experience includes working on NASA's Supersonic Transport Research Project at NASA's Langley Research Center. She is passionate, motivated, and willing to jump in and do whatever is necessary. Christine gracefully manages highly complex proposals with multiple investigators and multiple sub awards. She has an exceptional ability to translate technical/scientific concepts into fundable proposals. Christine created and leads a campus best-practices group. Christine is an adrenaline junkie. Her favorite activity is base jumping.



Strengths: Deep technical knowledge, motivation, graceful management

Development Areas: None

Likely role in 12 months: Same, if still satisfied

Departure risk: Unknown – need to determine

Focus for next twelve months: Discuss career plans, growth plans, how to challenge her in existing job (adrenaline junkie).

Research - Leonardo da Vinci's Direct Reports



Name: Janet Bragg

Title: Research Compliance Analyst

Age: 38

Years of Service: 13

Last Annual Performance Review Rating: Meets Expectations

Janet has been in the same role for 8 years, and working her way up from a level 2 position to a level 5. Janet has a vast amount of regulatory and funding requirement knowledge. She is highly respected and considered an expert externally in the industry. Janet regularly leads projects that are not only critically important to the school, but also the university. She finds it difficult to keep up with her workload and often spends nights and weekends in her office. Janet is detail-oriented and takes great pride in her work. Janet has recently been asked if she would like to manage a team and isn't thrilled about the idea. Janet rescues cats and is currently caring for six.

Strengths: Deep technical knowledge, project management, detail oriented

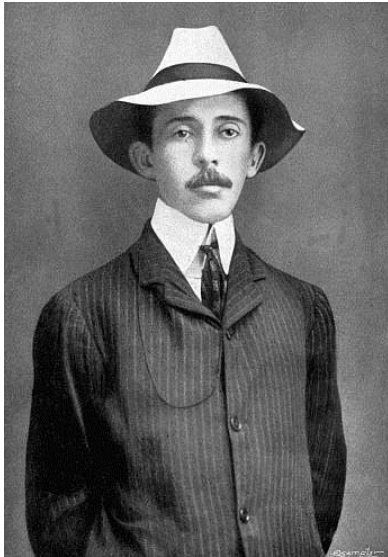
Development Areas: Time/Priority management

Likely role in 12 months: Same or manager

Departure risk: Low

Focus for next twelve months: Determine career interests and direction

Information Technology - Mae Jemison's Direct Reports



Name: Alberto Santos-Dumont

Title: Applications Programmer

Age: 56

Years of Service: 7

Last Annual Performance Review Rating: Exceeds Expectations

Alberto is a UCB alum that jumped at the opportunity to return. He previously worked in the IT department at Aerojet GenCorp. Alberto is a brilliant programmer known for the quality of his work. Alberto is professional and politically savvy and values the relationships he builds with clients. His team members think he is self-serving and his actions calculated. Alberto has designed two video games that have been commercially sold.

Strengths: Technical expert, external oriented, client relations

Development Areas: Relations with peers

Likely role in 12 months: Same

Departure risk: Future retirement risk

Focus for next twelve months: Coaching on working with peers, acknowledge and recognize contribution



Name: Neil Armstrong

Title: Business/Tech Support Analyst

Age: 41

Years of Service: 13

Last Annual Performance Review Rating: Needs Improvement

Neil has been at the School of Aeronautics for 13 years. He spent the first 8 years in external relations work and then transitioned to IT. During those 8 years in external relations, Neil has helped manage the Aerospace Enterprise Lab including the marketing and communications, as well as the cultivation and development of relationships with corporate partners. He had been touted as an exceptional project manager known for his agile approach. Over the last year his work has become subpar. He has become disgruntled about the slow pace of advancement and the short-term thinking of management. He especially has problems getting along with Mae. When she approaches him with tasks, his reply is often "that's not in my job description." Neil has never had a driver's license and is an avid bike rider.

Strengths: External relations, project management

Development Areas: Quality of work, focus

Likely role in 12 months: Either improvement in same role or re-evaluate

Departure risk: Voluntarily low

Focus for next twelve months: We've lost a valuable contributor. Determine interest, set clear expectations and accountabilities; determine future org and job fit



Information Technology - Mae Jemison's Direct Reports



Name: Harriet Quimby

Title: Systems Administrator

Age: 29

Years of Service: 5

Last Annual Performance Review Rating: Improvement Needed

Harriet has a passion for problem solving. She has a fantastic ability to explain technical issues to non-technical staff. On the other hand, she has a less than adequate systems/infrastructure knowledge. Harriet is untrusting of other staff members and is therefore reluctant to ask for help or to delegate. Harriet is very solution-focused, although she sometimes jumps to a solution rather than gaining clarity by asking more questions. Harriet loves to garden and often shares fruits and vegetables from her garden.

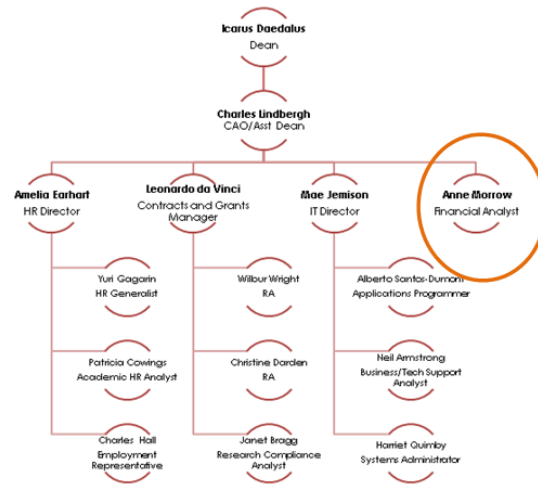
Strengths: Translating technical to non-technical people, solution focused

Development Areas: System/infrastructure knowledge; collaboration

Likely role in 12 months: Improvements in same role

Departure risk: Medium and acceptable – not sure if this is the right role for Harriet

Focus for next twelve months: Developing technical knowledge and collaboration.



Name: Anne Morrow

Title: Financial Analyst

Age: 34

Years of Service: 1

Last Annual Performance Review Rating: Meets Expectations

Anne worked for the California State Controller's Office before coming to the School of Aeronautics. She is tech savvy and able to make sense of highly-complex financial data. She is frustrated with the antiquated systems she is working with and is vocal about her dissatisfaction. Anne has a great working relationship with the Assistant Dean, but is not transparent with other members of the management team. Anne is a published poet and has begun writing a novel.

Strengths: Understanding and use of technology; financial expertise

Development Areas: Organizational fit

Likely role in 12 months: Same

Departure risk: Medium

Focus for next twelve months: Collaboration with other managers, clarity on role expectations, discussion of career interests/is this the best organization fit for her?

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