
Leadership Succession Review (LSR) Process



Leadership Succession Review

The Leadership Succession Review consists of four stages described at a high-level in the table below; *please note that the remainder of this document is focused on detailed information about Stage 1: Data Gathering.* The IRS Succession Planning Team and your business unit will provide you with additional information regarding Stages 2-4.

Leadership Succession Review			
Stage 1: Data Gathering	Stage 2: Review Discussions	Stage 3: Strategic Leadership Review	Stage 4: Feedback Conversations
Approximately 3 weeks	Approximately 3 weeks	Approximately 3 weeks	Approximately 3 weeks
Executives, Senior Managers, Department Managers Front-Line Managers	Executives, Senior Managers and Department Managers	Head of Office and Direct Reports to Head of Office	Executives, Senior Managers, Department Managers and Direct Managerial Reports
<p>Each Executive, Senior Manager, Department Manager, and Front-line Manager will have the option to complete a Self Assessment of Leadership Competencies.</p> <p>Each Executive, Senior Manager, and Department Manager will complete the three required activities below:</p> <ol style="list-style-type: none"> 1. Validate Current Organization Structure of Leadership Positions 2. Complete Assessments of Leadership Competencies for all direct reports 3. Complete a Succession Planning Matrix for Leadership Positions 	<p>Using the information gathered during stage 1 of the LSR process, Executives will lead meetings with Senior Managers discussing their subordinate managers.</p> <p>Prior to Executive meetings and where applicable, Senior Managers will lead meetings with Department Managers discussing Front-line Managers. Topics will include:</p> <ol style="list-style-type: none"> 1. Succession Planning Matrix for Current Leadership Positions 2. Overall Strengths and Gaps in Leadership Succession and Leadership Competencies 3. Recommendations for Leadership Development in Areas of Responsibility 	<p>Using the results of the LSR process from Stages 1 and 2, each Executive will meet with their direct reports at each executive level to discuss Senior Manager positions with the option to discuss subordinate management layers. Additional meetings between Campus Field Directors should also take place.</p> <p>Topics will include:</p> <ol style="list-style-type: none"> 1. Succession Planning Matrix for Current Leadership Position 2. Overall Strengths and Gaps in Leadership Succession and Leadership Competencies 3. Recommendations for Leadership Development within the Business Unit.. 	<p>Using the Assessment of Leadership Competencies completed in Stage 1 and having received additional perspective from Stages 2 and 3, each Executive, Senior Manager, and Department Manager will meet with their direct reports to provide feedback and discuss:</p> <ol style="list-style-type: none"> 1. Assessment of Leadership Competencies 2. Strengths and opportunities for improvement 3. Draft development ideas and plans <p>If a Self Assessment of Leadership Competencies was completed, this feedback session will also involve a discussion of that self-assessment.</p>

How to Complete Screen 1

Sample Screen 1, Assessment of Leadership Competencies Questionnaire

Address  http://192.168.2.12/irs_cac_ls/leadership/form_info.asp Go  Links 



Assessment of Leadership Competency

Home
Guided Tour
Leadership
Introduction
Assessment Form
Draft Toolkit
Leadership Competency Booklet
Reports
Privacy Information

Assessment Form

Complete the information below.

<p>1. Employee Name</p> <input style="width: 95%; height: 25px;" type="text"/>	<p>2. SEID:</p> <input style="width: 95%; height: 25px;" type="text"/>	<p>Current Position</p> <p>3a. Title:</p> <input style="width: 95%; height: 25px;" type="text"/>	<p>4a. Organization:</p> <input style="width: 95%; height: 25px;" type="text"/>
		<p>3b. Series:</p> <input style="width: 95%; height: 25px;" type="text"/>	<p>4b. Division:</p> <input style="width: 95%; height: 25px;" type="text"/>
		<p>3c. Grade:</p> <input style="width: 95%; height: 25px;" type="text"/>	

<p>5. Are you presently a manager?</p> <p><input type="radio"/> Yes <input type="radio"/> No</p>	<p>6. Current Position Level: (please check one)</p> <p><input type="radio"/> Non-Manager <input type="radio"/> Department Manager <input type="radio"/> Senior Manager</p>	<p>7. Are you interested in advancing to the next management level?</p> <p><input type="radio"/> Yes <input type="radio"/> No</p>	<p>7a. Do you want to complete a self- assessment:</p> <p><input type="radio"/> Yes <input type="radio"/> No</p>
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<p>8a. Next Step Indicate the level you are targeting as a next step in your career.</p> <p><input type="radio"/> Front Line <input type="radio"/> Department Manager <input type="radio"/> Senior Manager <input type="radio"/> Executive</p>	<p>8b. Highest Step Indicate the level you would ultimately aspire to achieve in your career at IRS.</p> <p><input type="radio"/> Front Line <input type="radio"/> Department Manager <input type="radio"/> Senior Manager <input type="radio"/> Executive</p>
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<p>9. Are you willing to relocate?</p> <p><input type="radio"/> Yes <input type="radio"/> No</p> <p>If yes, select location. (press and hold the Ctrl key to select multiple locations)</p> <div style="border: 1px solid black; padding: 2px;"><p>All Locations Atlanta GA Andover MA Austin TX Baltimore MD Boston MA</p></div>

« Back Submit

How to Complete Screens 2-22⁴

Sample Screen 2, Assessment of Leadership Competencies Rating Sheet

Address http://192.168.2.12/irs_cac_ls/leadership/form_comp.asp



Competency Assessment Center
Assessment of Leadership Competency

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Assessment of Leadership Competency

Leadership Competency [\[Instructions\]](#)

Customer Focus. Understands the internal and external customers' points of view and uses this understanding to prevent and solve problems and provide quality service. Solicits internal and external customers' interests and adjusts priorities to meet changing customer needs. Anticipates and meets the needs of customers by delivering and continuously improving quality services.

- Level 1.** Solicits and Understands Internal/External Customer Needs: Solicits and understands customers points of view. Strives to balance interests of the taxpayers with the interests of the government.
- Level 2.** Responds to Internal /External Customer Needs: Personally interacts with customers to correct problems promptly without being defensive. Works to make self fully available to customers and protect taxpayer's rights.
- Level 3.** Takes Action for the Internal/External Customer: Makes concrete attempts to add value for customers, to make things better for them in some way. Seeks information about the real, underlying needs of the customers beyond those expressed initially, and matches these to available or customized services Collaborates to develop mutually acceptable outcomes with customers.
- Level 4.** Uses a Long Term Perspective: Works with a long-term perspective in addressing customer problems and issues. May trade off immediate costs for the sake of the long-term relationship. Looks for long-term benefits to the customer.
- Not Observed.**

Consider each competency individually and check the box that best reflects the current leadership qualities and behaviors demonstrated by yourself (for a self-assessment) or the individual you are evaluating. You will need to rate all 21 Leadership Competencies.

4 To see what all 21 screens look like, refer to Appendix B.

Determine which level best demonstrates where you feel you are for a self-assessment or what level you feel the employee is for a managerial assessment.

Sample Screen 23: Assessment of Leadership Competencies Approval Sheet

Ready Now <input type="checkbox"/> Employee is ready to be considered for another role or position as a result of current demonstrated competencies	Ready with Development <input type="checkbox"/> Employee exhibits many of the competencies, but needs to fully exhibit one or more key competencies to be considered for another role or position.	Not Ready <input type="checkbox"/> Exhibits some of the competencies at the target level, but needs to fully exhibit many or most of the key competencies by successfully completing their current role before being a competitive candidate for the position.
Rating Official's Signature:	Date:	
Approving Official's Signature:	Date:	
Employee Signature: (Indicating this evaluation has been discussed with me and I have been given a copy.)	Date:	

After completing your rating of all of the competencies, you will determine whether the individual you are assessing is "Ready Now," "Ready with Development," or "Not Ready." For validation, the assessment requires signatures of the employee, rating official and reviewing official.

The table below further defines the individual readiness levels.

Individual Readiness Level	Definition as Applied to Individual
Ready Now	Exhibits most or all of the competencies at the target level to be considered among a group of candidates if the position became immediately vacant.
Ready with Development	Exhibits many of the competencies at the target level, but needs to fully exhibit one or a number of key competencies, or needs to finish or accomplish one or a number of key deliverables in their present role, before being a competitive candidate for the position.
Not Ready	Exhibits some of the competencies at the target level, but needs to fully exhibit many or most of the key competencies by successfully completing their current role before being a competitive candidate for the position.

After completion of one or more individual Leadership Competency Assessments, a summary page will be automatically populated and available for you to review the assessments you have completed as a manager.

Sample Screen 24: Assessment of Leadership Competencies Summary Page

	Name: Title:	John Smith Senior Manager	Sally Jones Manager
21 Leadership Competencies			
Customer Focus		3	0
Diversity Awareness		4	3
Integrity / Honest		3	4
Technical Credibility		1	2
Teamwork		2	3
Problem Solving		3	4
Partnering		3	2
Communication		1	3

Sample Screen 24: Assessment of Leadership Competencies Summary Page (Continued)

Adaptability		2	1
Influencing / Negotiating		1	1
Developing Others		3	2
Decisiveness		4	0
Continual Learning		1	1
Business Acumen		4	4
Achievement Orientation		3	2
Strategic Thinking		4	0
Service Motivation		3	4
Political Savvy		2	2
Group Leadership		3	0

Sample Screen 24: Assessment of Leadership Competencies Summary Page (Continued)

External Awareness		2	2
Entrepreneurship		1	2
Readiness		Ready Now	Ready with Development
Currently a manager?		Y	Y

Ability to Relocate?		Y	N
Current Position Level		Senior Manager	Frontline Manager
If the employee is not presently a manager, are they interested in participating in the leadership assessment process at this time?		-	-
If the employee is currently a manager, are they interested in advancing to the next management level?		Y	N
Next Managerial Level:		Executive	
Career Managerial Level:		Executive	

C. Leadership Succession Matrix

Background

This section contains a succession-planning tool named the "Leadership Succession Matrix" (Matrix) that will be used to identify potential individuals for your subordinate IRS leadership positions. Completion of the tool also serves to document nominees' levels of readiness for possible succession to the new role(s).

Objectives

Creating a succession plan for leadership positions will support IRS in achieving its Strategic Plans and Business Unit goals through proactive human capital management. By conducting this succession planning exercise, you will be asked to consider backfills and estimate individual readiness levels for given leadership positions. Use the Assessment of Leadership Competencies Summary Page to help guide your thought process on the readiness of those for whom you have completed Assessments of Leadership Competencies. In addition to this, think broadly about individuals who might be developed or considered as backfills for the leadership roles. Include the names of persons in your organization and throughout IRS. Also, consider talented employees from other Bureaus or Offices within the Treasury Department, from other Federal, State, or local Government Services, and from non-government organizations in the private or non-profit sectors.

Instructions for Completing the Leadership Succession Matrix

Sample Leadership Succession Matrix:

Essential Leadership Positions	Positions: <i>Senior Manager - Collections</i>	Positions: <i>Senior Manager - Examinations</i>	Positions:
	Individuals	Individuals	Individuals
Ready Now Exhibits most or all of the competencies at the target level to be considered among a group of candidates if the position became immediately vacant.	<i>Amy Attorney Ron Records (ABC Agency)</i>		
Ready with Development Exhibits many of the competencies at the target level, but needs to fully exhibit one or a number of key competencies, or needs to finish or accomplish one or a number of key deliverables in their present role, before being a competitive candidate for the position.	<i>Edward Engineer Terry Technical</i>		
Not Ready Exhibits some of the competencies at the target level, but needs to fully exhibit many or most of the key competencies by successfully completing their current role before being a competitive candidate for the position.			
Individuals to Watch Long Term Exhibits excellent performance in their current role, however, lacks many of the experiences and accomplishments to typically be considered a viable candidate. Due to positive performance trends, the individual should be considered for accelerated development. ⁵	<i>Steve Safety</i>		

Begin by identifying the titles of your leadership positions at the Department Manager or Senior Manager level. Enter each title at the top of a column of the matrix, creating column headings with the name of each leadership position.

Next, provide the names of individuals you feel are appropriate to consider for possible development to the position noted at the top of the column. Estimate the "Readiness" of individuals to be considered for the role by placing them at the appropriate readiness level.

In the sample matrix on the previous page, there are two managerial positions displayed in the top row. Under the first position, there are four candidates displayed, each at different levels of "Readiness" as candidates. In the case of "Edward Engineer" and "Terry Technical," Edward's name is displayed above Terry because he is considered a slightly stronger candidate at about the same level of "Readiness." Also in the example, "Ron Records" is displayed as a possible candidate, and because he works in another agency, the name of his organization ("ABC Agency") is displayed.

5-The last row in the matrix "individuals to watch long term" refers to individuals who have leadership potential, but are not currently eligible for the next level of management

Additional Reading and Sources Concerning Planning

References:

The following books are recommended reading for any leader interested in learning more about the topics of succession planning and leadership development:

Primal Leadership

Realizing the Power of Emotional Intelligence

By: Daniel Goleman, Richard Boyatzis and Annie McKee

•*New York Times national bestseller*

Working with Emotional Intelligence

By: Daniel Goleman

The Leadership Pipeline

How to Build the Leadership – Powered Company

By: Ram Charan, Stephen Drotter, and James Noel

Good to Great: Why Some Companies Make the Leap...and Others Don't

By: Jim Collins

First, Break All the Rules: What the World's Greatest Managers Do Differently

By: Marcus Buckingham, Curt Coffman

The 21 Irrefutable Laws of Leadership (Follow Them and People Will Follow You)

By John C. Maxwell

Leadership Competencies



Developing Great Leaders

Leadership Competencies/ Core Responsibilities

Leadership

- Adaptability
- Communication
- Decisiveness
- Integrity/Honesty
- Service Motivation
- Strategic Thinking

Employee Satisfaction

- Continual Learning
- Developing Others
- Diversity Awareness
- Group Leadership
- Teamwork

Customer Satisfaction

- Customer Focus
- Entrepreneurship
- External Awareness
- Influencing/Negotiating
- Partnering

Business Results

- Achievement Orientation
- Business Acumen
- Political Savvy
- Problem Solving
- Technical Credibility

Leadership & Education

<http://hco.web.irs.gov/1rc/lcdc/index.htm>

Introduction

This booklet contains the definitions for each of the 21 IRS Leadership Competencies. Each competency definition includes the types of behaviors that demonstrate the competency and ideas for onthejob development of the competency.

You can use this booklet as a quick reference to Leadership Competencies and more importantly as a reminder to practice the leadership behaviors in your daily work activities.

For more information about leadership development visit the IRS Great Leader Career Development website at:

<http://hco.web.irs.gov/1rc/lcdc/index.htm>

Leadership Career Development Process



To assess your Leadership skills go to:
<http://hco.web.irs.gov/1rc/lcdc/index.htm>

ACHIEVEMENT ORIENTATION

Pushes self and others to set and meet goals. Strives to improve performance through balanced measures. Uses creative and innovative techniques for producing quality work and surpassing a standard of excellence. Takes on challenging assignments and persists until significant performance improvements are attained.

The types of behaviors that demonstrate this competency are:

❁ Focuses on Doing Well: Consistently strives to produce quality work. Feels good about accomplishments and is frustrated with inefficiency, waste or internal issues that slow down achieving results.

❁ Sets and Meets Goals: Sets goals and uses own methods of measuring outcomes against a standard of excellence. May focus on new or more precise ways of meeting goals set by others.

❁ Improves Performance: Pushes self and team to do better; is not satisfied with current performance levels. Makes specific changes to the system or own work processes in order to improve performance (e.g., does something faster, more efficiently; improves quality, uses creative and innovative techniques).

❁ Accepts Challenges, Persists and Makes Large Scale Performance Improvements: Takes on difficult assignments and is excited by the challenge. Creates goals for improvement and measures performance against those goals; compares current performance with baseline performance to track improvements. Persists until large-scale performance improvements are achieved.

ADAPTABILITY

Demonstrates openness to change and to receiving new information; readily changes behavior and work methods in response to new information, changing conditions, or unexpected obstacles. Adjusts rapidly to new situations warranting attention and resolution. Modifies tactics or the overall strategy based on requirements of the situation.

The types of behaviors that demonstrate this competency are:

- ❁ Demonstrates Adaptability: Is able to shift behaviors and priorities based on changing work demands. Alters normal procedures to fit specific needs of team or situation, to get the job done and/or meet goals (e.g., adjusts own schedule, shifts workload).
- ❁ Modifies Behavior in Reaction to New Situations: Rapidly adjusts to frequent changes and modifies behavior or management style in response to new situations. Decides what to do based on the situation or people involved.
- ❁ Adapts Approach to Achieving Goals: While maintaining the same overall plan or goal, changes how to accomplish the plan or goal. Is able to anticipate new situations and move into unfamiliar organizations (internal and external) or functional/program areas in an effort to achieve an established plan, goal or project.
- ❁ Adapts Overall Strategy: Changes the overall plan, goal or project to fit the situation. May involve making temporary changes to the structure or goal of a program/organization to meet the overall needs of the situation.

ADAPTABILITY

Ideas for Developing this Competency:

- Develop a program to visibly acknowledge accomplishments and/or risk taking.
- Talk to peers, networks, and benchmark with others to see a new way of doing things.
- Participate in a redesign effort.
- Lead a group to problemsolve a situation without being the final decisionmaker and encourage the group to make the decision.
- Lead or participate in a crossfunctional Commissioner Representative team to solve a problem.
- Lead a group process improvement effort (for example, address overage for a certain category of returns).
- Learn to apply a change theory model (for example, Bridges' or Kotter's theory) to a group change.
- Lead your team in the group's development of a strategy to deal with a major change.
- Model acceptance and adapting to an impending change.



Leadership Competencies



Developing Great Leaders

Leadership Competencies/ Core Responsibilities

Leadership

- Adaptability
- Communication
- Decisiveness
- Integrity/Honesty
- Service Motivation
- Strategic Thinking

Employee Satisfaction

- Continual Learning
- Developing Others
- Diversity Awareness
- Group Leadership
- Teamwork

Customer Satisfaction

- Customer Focus
- Entrepreneurship
- External Awareness
- Influencing/Negotiating
- Partnering

Business Results

- Achievement Orientation
- Business Acumen
- Political Savvy
- Problem Solving
- Technical Credibility

Leadership & Education

<http://hco.web.irs.gov/1rc/lcdc/index.htm>

Introduction

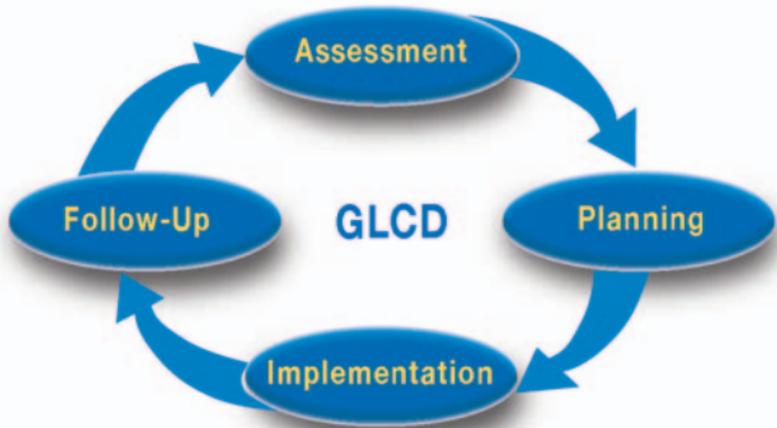
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Leadership Career Development Process



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ACHIEVEMENT ORIENTATION

Ideas for Developing this Competency:

- Use a coaching approach to support team members in dealing with a complex project to improve performance.
- Identify, design and implement a streamlined business process (Process Analysis Lesson Frontline Managers Course) using a collaborative approach with the work group.
- Use a balanced measures approach to engage your team in developing a plan that improves team performance.
- Seek opportunities to participate in Servicewide (cross functional) task groups that create or redesign high impact work processes.
- Create an open, trusting workgroup environment to encourage continuous improvement by challenging current work processes.
- Seek opportunities to step out of your comfort zone through challenging work assignments or projects.
- Identify a process to solicit employee input for improving the use of resources.



ADAPTABILITY

Demonstrates openness to change and to receiving new information; readily changes behavior and work methods in response to new information, changing conditions, or unexpected obstacles. Adjusts rapidly to new situations warranting attention and resolution. Modifies tactics or the overall strategy based on requirements of the situation.

The types of behaviors that demonstrate this competency are:

- ❁ Demonstrates Adaptability: Is able to shift behaviors and priorities based on changing work demands. Alters normal procedures to fit specific needs of team or situation, to get the job done and/or meet goals (e.g., adjusts own schedule, shifts workload).
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- ❁ Adapts Overall Strategy: Changes the overall plan, goal or project to fit the situation. May involve making temporary changes to the structure or goal of a program/organization to meet the overall needs of the situation.

ADAPTABILITY

Ideas for Developing this Competency:

- Develop a program to visibly acknowledge accomplishments and/or risk taking.
- Talk to peers, networks, and benchmark with others to see a new way of doing things.
- Participate in a redesign effort.
- Lead a group to problemsolve a situation without being the final decisionmaker and encourage the group to make the decision.
- Lead or participate in a crossfunctional Commissioner Representative team to solve a problem.
- Lead a group process improvement effort (for example, address coverage for a certain category of returns).
- Learn to apply a change theory model (for example, Bridges' or Kotter's theory) to a group change.
- Lead your team in the group's development of a strategy to deal with a major change.
- Model acceptance and adapting to an impending change.



BUSINESS ACUMEN

Applies core management area (financial, human resources and technology) principles and approaches to increase program and workplace effectiveness. Takes steps to prevent waste, fraud and abuse. Manages available resources, makes costbenefit decisions, and develops and implements strategies to make sound business management decisions in a manner which instills public trust.

The types of behaviors that demonstrate this competency are:

❁ Understands Core Management Areas: Demonstrates a fundamental understanding of the principles of financial management, marketing, human resources management and technology applications in daytoday activities.

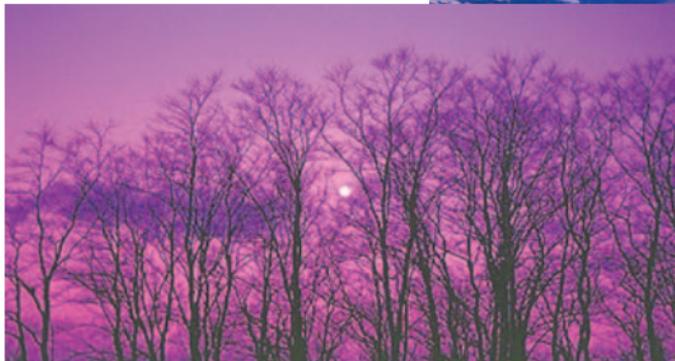
❁ Uses Knowledge of Core Management Areas to Increase Workplace Effectiveness: Assesses current and future financial and human resource requirements and uses costbenefit approaches to set priorities and identify ways to effectively and efficiently satisfy anticipated needs. Considers and uses technology appropriately to increase workplace productivity. Manages programs and budgets in a costeffective manner.

❁ Understands and Addresses the Most Current Thinking and Practices In Core Management Areas: Uses a broad perspective of the dynamic shifts in the fields of financial management, human resources management and technology applications to identify opportunities for new programs or services.

BUSINESS ACUMEN (continued)

The types of behaviors that demonstrate this competency are:

❁ Anticipates Future Trends and Appropriate Applications of Core Management Areas: Uses indepth knowledge of the organization and the core management areas to identify and design new strategies for the organization. Determines how the organization can best position itself to add value to the public over the long term.



BUSINESS ACUMEN

Ideas for Developing this Competency:

- Partner with key stakeholders in product, program, service, equipment or systems purchase to learn about financial processes in the IRS.
- Seek input and buyin at group meetings on the use of organizational resources within your control or influence, for example, assignment of equipment, travel and training budget.
- Lead a team to redesign or reconfigure an office environment to promote better use of resources and increase employee engagement.
- Design and lead periodic tax practitioner forums to stay abreast of customer issues and determine how IRS can best use its resources to improve customer service.
- Seek opportunities to participate on teams and task groups to create or redesign high impact work processes.
- Use a coaching approach to support team members who are dealing with a complex project to improve performance.
- Create an open, trusting workgroup environment to encourage continuous improvement by challenging current work processes in financial, human resource or technological areas.



COMMUNICATION

Engages others and facilitates twoway communication through oral and written presentations to individuals and groups. Expresses facts and ideas clearly and in an organized manner. Adapts oral and written communication to the needs, interests and style of the audience. Connects with employees and helps to create a cohesive work environment through effective listening. Uses open communication strategically to achieve an objective. Communicates tactfully and with empathy, treating others with respect.

The types of behaviors that demonstrate this competency are:

❁ Fosters Open and Honest Communication: Engages audience in twoway communication. Presents ideas, either verbally or in writing, in a way that engages others. Selects the appropriate medium for communicating issues. Listens effectively to other ideas and opinions.

❁ Clarifies or Emphasizes the Message: Conveys the importance of the message clearly and confidently. Shares information (e.g., competitive comparisons, appropriate financials) openly with the team. Listens and responds to others' reactions and uses appropriate methods (e.g. examples, visual aids) to listen effectively, clarify or emphasize the message.

COMMUNICATION (continued)

The types of behaviors that demonstrate this competency are:

❁ Addresses the Needs, Interests and Style of the Audience:

Adjusts communication in accord with audience's mood and emotional reaction. Considers and responds appropriately to the needs, feelings, and capabilities of different people in different situations. Tailors written communication to the type of content and audience. Allows others ample opportunity to react and express themselves. Exchanges information in a constructive, noncritical and nondefensive manner.

❁ Uses Communication in a Strategic Manner: Develops an

integrated communication approach to support a vision or strategy. Strategically uses communication (e.g., medium, timing, message, presenter) to produce enthusiasm and foster an atmosphere of open exchange and support.



COMMUNICATION

Ideas for Developing this Competency:

- Present proposal or briefing report to top management .
- Write a proposal for a new system, product or service (for example, the Statement of Work for a procurement, etc).
- Serve on an instructor panel (CITC certified) integrating your training material to the needs of the respective audience
- Participate in Toastmasters to develop selfconfidence and practice various communication techniques.
- Conduct group meetings where you take the role of the facilitator and the work group presents and discusses the agenda.
- Seek rotational assignment to a function where writing skills are needed.
- Design a communication plan, collaborating with communication experts, to announce a new system, product, or service.
- Make a presentation to stakeholder groups focusing on the level of expertise and needs of the audience.
- Design training module (or course) for CPE with a clear focus and emphasis on the type of audience receiving the training.
- Instruct a CPE using communication techniques that encourage interactive audience participation.
- Serve as a CITC instructor.
- Work on IVT Project.
- Take an assignment that requires the use of influence or persuasion to address goals or expectations
- Become a servicewide facilitator to build listening and group decision making skills.

CONTINUAL LEARNING

Creates and values new learning opportunities; grasps the essence of new information; masters new technical and business knowledge; recognizes own strengths and weaknesses; pursues selfdevelopment; seeks feedback from others and opportunities to master new knowledge so that customer service and business processes are improved.

The types of behaviors that demonstrate this competency are:

- ❁ Aware of Own Strengths and Limits: Has a realistic sense of own abilities. Willing and able to receive both positive and developmental feedback from others.
- ❁ Keeps Current in Own Field of Expertise: Takes initiative to stay current with new approaches in tools, methods or technologies in own discipline by reading, talking to others, attending courses, or by experimenting with innovative approaches.
- ❁ Makes Long Term Selfdevelopment Plans: Develops longterm goals for selfimprovement that will be beneficial to the organization. Seeks out feedback regarding areas for improvement and incorporates into own development planning.
- ❁ Keeps Current with Business Changes: Stays current on new tools, methods, technologies or approaches that may potentially impact the business, even when these areas are outside of own area of expertise.

CONTINUAL LEARNING

Ideas for Developing this Competency:

- Seek details outside of your function to enhance your perspective of the organization and to increase technical skills.
- Get an assignment with or shadow to work with a higher level manager or an expert outside of your area of expertise in order to observe their leadership style and expertise as well as particular aspects of their job.
- Serve as an onthejob instructor (OJI) striving to improve your own expertise by teaching to others.
- Develop a Career Learning Plan with goals that stretch your learning opportunities beyond the status quo.
- Form a local learning, discussion group in a subject area that meets needs and interests. (for example, foreign language, technical or leadership topics).
- Seek opportunities to become a faculty member for an IRS Leadership course (for example, Frontline Readiness Program; Frontline Manager Program, Leading Teams).
- Apply to a leadership readiness program for advancement as well as continual learning.
- Initiate an effort to share expertise across group lines collaborating with others to share mutual learning opportunities.
- Solicit a mentor through the IRS mentoring program and work with the mentor to identify on the job learning opportunities.
- Use shadowing as peer coaches to learn a new operation and to give & receive feedback.

CUSTOMER FOCUS

Understands the internal and external customers' points of view and uses this understanding to prevent and solve problems, and provide quality services. Solicits internal and external customers' interests and adjusts priorities to meet changing customer needs. Anticipates and meets the needs of customers by delivering and continuously improving quality services.

The types of behaviors that demonstrate this competency are:

❁ Solicits and Understands Internal/External Customer Needs:

Solicits and understands customers' points of view. Strives to balance interests of the taxpayers with the interests of the government.

❁ Responds to Internal /External Customer Needs: Personally interacts with customers to correct problems promptly without being defensive. Works to make self fully available to customers and protect taxpayers' rights.

❁ Takes Action for the Internal/External Customer: Makes concrete attempts to add value for customers, to make things better for them in some way. Seeks information about the real, underlying needs of the customers beyond those expressed initially, and matches these to available or customized services. Collaborates to develop mutually acceptable outcomes with customers.

❁ Uses a Long Term Perspective: Works with a longterm perspective in addressing customer problems and issues. May trade off immediate costs for the sake of the longterm relationship. Looks for longterm benefits to the customer.

CUSTOMER FOCUS

Ideas for Developing this Competency:

- Staff an information/marketing booth at a local business convention or taxpayer forum.
- Spend a day or two, preferably a week, with internal customers observing their work to better appreciate their requirements.
- Meet periodically with internal customers to assess and update current needs, exchange information and interests, etc.
- Present customer satisfaction ratings at team meetings to assess progress and determine appropriate adjustments to operations.
- Executives and senior managers can periodically spend several days working a frontline operation (for example, walkin, phone center, field visits) to better appreciate the nature of customer interactions.
- Conduct focus groups with customers to improve forms or correspondence.
- Analyze taxpayer correspondence for trends and improvement opportunities.
- Develop new customer satisfaction survey questions for your division.



DECISIVENESS

Exercises good judgment by making sound and wellinformed decisions; perceives the impact and implications of decisions, makes effective and timely decisions, even when data are limited or solutions produce unpleasant consequences. Exhibits an optimistic and persistent approach when facing business challenges. Acts proactively.

The types of behaviors that demonstrate this competency are:

❁ Acts Responsively and Makes Timely Decisions: Recognizes and acts upon present opportunities. Overcomes obstacles to address present problems.

❁ Acts Without Complete Information: Stops excessive debate and makes a decision. Identifies and leverages opportunities in the face of ambiguous circumstances or in the midst of a confusing situation.

❁ Makes Decisions in Challenging Business Environments: Willingly takes the lead and makes tough decisions in times of crisis. Has confidence to make bold decisions quickly.

❁ Persists and Holds Firm on Tough Decisions: Makes and stands by sound decisions when faced with resistance from others.

DEVELOPING OTHERS

Develops leadership in others through coaching, mentoring, recognizing, rewarding and teaching employees. Guides subordinates as they do their work. Creates an environment for continuous learning that encourages short and long term selfdevelopment.

The types of behaviors that demonstrate this competency are:

- ❁ Gives How-to Directions: Gives detailed instructions and/or onthejob demonstrations; tells how to do the task; makes specific and helpful suggestions. Works patiently with others who may be struggling.
- ❁ Informally and Formally Develops Others: Gives directions or demonstrations with reasons or rationale as a means to develop skills and expertise. Guides others as they do their work without doing the work for them. Supports developing others by serving as an instructor.
- ❁ Provides Feedback to Encourage Development: Gives specific positive or developmental feedback for developmental purposes. Reassures others after a setback. Gives individualized suggestions for improvement. Explains on an ongoing basis what was done well and how to improve on technical and business skills.

DEVELOPING OTHERS

Ideas for Developing this Competency:

- Serve as an onthejob instructor for developing junior employees and managers and encourage employees to serve as an OJI for a new team member.
- Serve as a mentor for someone outside of your function using your experience and networks to help another in career development.
- Teach a leadershiptraining course focusing on transferring your knowledge and experiences to newer managers.
- Provide specific and timely feedback to your employees, managers and peers - use the feedforward approach.
- Provide targeted acting and developmental assignments for your employees based on their needs identified during active career counseling and coaching.
- Recommend employees for appropriate task forces, OJI assignments and training according to their career development needs.
- Review and provide feedback to your employees on their job applications.
- Conduct mock interviews with your employees to prepare them for a job interview.
- Manage a Trainee Group focusing on building strengths and skills in new employees through team development activities.
- Create a forum in your workgroup for sharing/learning technical and new information, such as, instituting a weekly Lunch & Learn or sponsoring a Learning Day during which each group member shares something new.
- Coach a new employee, peer or manager and also encourage your employees to coach.

DEVELOPING OTHERS (continued)

Ideas for Developing this Competency:

- Provide feedback to a difficult participant/employee/peer using the feedforward process .
- Push an employee outside his/her comfort zone, such as, teaching something he/she knows, public speaking, learning something new.
- Set standards for ongoing learning for your group and develop a work plan to promote this process.
- Provide debriefing feedback sessions after a developmental assignment for your employees.
- Assist your work group members in creating their individual Career Learning Plan by using a development process that includes assessment, planning, implementation & feedback.
- Conduct an open followthrough dialogue on an individual's Career Learning Plan progress.
- Establish a group system for solving difficult cases or problems in which group members share and provide input.



DIVERSITY AWARENESS

Values and embraces diversity. Demonstrates confidence in self and others; considers different perspectives and experiences of the workforce and customers. Ensures that the organization builds on these differences and that employees and customers are treated in a fair and equitable manner.

The types of behaviors that demonstrate this competency are:

- ❁ **Willing to Learn From Others:** Solicits ideas and opinions to help form specific decisions or plans. Demonstrates selfconfidence. Promotes team cooperation showing positive regard for others who are different from oneself.
- ❁ **Open to Diversity:** Respects, treats with courtesy, and relates well to people of diverse backgrounds. Is sensitive to, and shows tolerance for, differing views. Applies knowledge of EEO rules and regulations to promote and maintain a fair work environment.
- ❁ **Values Diverse Perspectives:** Encourages group members to contribute. Values and encourages contributions from others who have varying perspectives, experiences, or needs. Understands the underlying causes for someone's feelings, behavior, or concerns. Promotes consensus decisionmaking.
- ❁ **Fosters Diversity:** Uses understanding of others to create an environment that values/encourages/learns from various perspectives and experiences. Works to resolve conflicts between individuals with diverse perspectives. Models behavior that demonstrates the importance of diversity and supports diversity efforts.

DIVERSITY AWARENESS

Ideas for Developing this Competency:

- Participate in an employee organization activity.
- Participate as a member of a Reasonable Accommodation Committee.
- Learn American Sign Language to broaden your perspective of individual differences.
- Spend time with persons from a different function, generation or background and with people you do not know in order to broaden your awareness of others.
- Conduct a group session using Myers Briggs Type Indicator or DISC session or other awareness tool to share differences.
- Start a meeting with a Get to Know You activity to break down barriers between employees.
- Build a team with maximum diversity for a project you are running.
- Pair employees or managers from different backgrounds or generations so that they can learn from each other.



ENTREPRENEURSHIP

Creates innovative solutions. Identifies opportunities to develop and market services and new products within or outside of the organization. Manages risks; initiates actions that involve a deliberate risk to achieve a recognized benefit or advantage. Encourages others to develop new ideas and take risks.

The types of behaviors that demonstrate this competency are:

❁ **Develops Solutions to Meet Needs/Opportunities:** Identifies needs and opportunities, and develops new services within or outside the organization. Will consider the radical or unconventional. Is prepared to look beyond the data for solutions.

❁ **Encourages Risktaking in Others:** Promotes an entrepreneurial environment within the work unit. Supports risktaking by employees in an effort to increase effectiveness. (e.g., uses mistakes as learning opportunities.)

❁ **Experiments With Solutions:** Sets priorities or chooses goals on the basis of calculated inputs and outputs. Makes explicit considerations of potential cost savings and return on investment. Develops and implements varied solutions to increase program and workplace effectiveness.

❁ **Takes Calculated Entrepreneurial Risks:** Commits significant resources and/or time, (in the face of uncertainty) to increase benefits, (i.e., improve performance, reach a challenging goal etc.)

ENTREPRENEURSHIP

Ideas for Developing this Competency:

- Encourage open discussion, unconventional thinking and risktaking leading to innovative and proactive business decisions.
- Collaborate with peers and subordinates in creating a compelling vision and/or symbol that focuses efforts on innovation and change.
- Benchmark external and internal organizations to identify best practices and business trends.
- Lead or participate on a task team whose focus is developing innovative solutions to business problems.
- Lead or participate in a community or professional organization outside the IRS that focuses on activities different from your normal work.
- Assess work processes, products and services to recognize and appreciate what is working, which produces greater engagement and momentum for change.
- Learn from mistakes to improve future productivity.



EXTERNAL AWARENESS

Identifies and keeps uptodate on key policies and economic, political, and social trends that might impact the organization. Understands short- and long-range plans relating to tax administration in a global economy. Interacts with key stakeholders in industry and the public sector.

The types of behaviors that demonstrate this competency are:

❁ Identifies Trends in External Environment: Identifies and keeps uptodate on technical improvements; key policies; and economic, political, business and social trends that might impact the organization.

❁ Acts on Current Trends in the External Environment: Understands and addresses the underlying problems, opportunities or political forces affecting the organization (e.g., tax practitioners, taxpayers, other governmental agencies). Positions the organization's services to take advantage of current trends.

❁ Understands Future Developments in the External Environment: Understands the direction of government and industry and how changes might impact the IRS; considers how present policies, processes, and methods, as well as ongoing issues, might be affected by future developments and trends.

❁ Uses Knowledge of the External Environment to Improve The Organization's Position: Makes strategic decisions based on emerging trends in the external environment. Uses the understanding of future trends to devise plans to restructure the organization's ability to meet stakeholders' needs.

EXTERNAL AWARENESS

Ideas for Developing this Competency:

- Serve on a team to develop plans to lobby for legislative changes.
- Seek opportunities to serve as a loaned manager outside of the organization.
- Conduct a study on current trends impacting future tax compliance.
- Participate in foreign government tax exchange forums.
- Participate in strategic planning efforts around emerging trends in global economy.
- Actively participate in outside professional organizations who represent taxpayers. Teach leadership and/or technical topics through the Treasury program that assists developing countries with tax administration and resource issues.
- Use intranet/internet sources and professional publications to keep current on emerging trends.
- Share trend information during group meetings. Encourage and support employees in making presentations at meetings on hot topics or emerging trends.
- Study the impact of the President's Management Agenda and the OPM Human Capital Strategy on the IRS structure, policies and processes. Provide leadership using this frame of reference.



GROUP LEADERSHIP

Informs people and ensures the practical needs of the group are met. Develops a motivating environment by involving group members in decisionmaking and goal accomplishment. Develops and implements a shared vision. Leads through personal example and through communication of a compelling vision.

The types of behaviors that demonstrate this competency are:

❁ **Informs and Involves People:** Lets people affected by a decision know what is happening. Makes sure the group has all of the necessary information about a decision or change. Explains the reasons for a decision or change. Effectively shares information and resources within a workgroup or project team. Contributes to and supports the decisionmaking process used by the group.

❁ **Supports and Empowers Group Members:** Empowers group members to take accountability and authority for the overall productivity of the group. Involves employees appropriately in the decisionmaking process. Makes sure the practical needs of the group are met by obtaining needed personnel, resources, and information for the group. Models behavior that supports nonhierarchical relationships. Communicates the organization's Mission, Guiding Principles and Strategic Business Goals. Leads through personal example within the work group.

GROUP LEADERSHIP (continued)

The types of behaviors that demonstrate this competency are:

❁ **Promotes Group and Crossfunctional Effectiveness:** Uses strategies to improve group productivity (e.g., group assignments, crosstraining). Obtains cooperation from other areas of the organization to minimize obstacles to goals. Promotes organizational effectiveness by encouraging employees to share information and resources with other areas of the organization in an effort to enhance decisionmaking, solve mutual problems and achieve strategic business goals. Leads through personal example within the territory/operation.

❁ **Communicates a Compelling Vision:** Develops and implements a shared vision that integrates organizational goals, priorities and values with innovative programs and processes. Communicates a vision that produces clarity, excitement, enthusiasm and commitment. Models the organization's Mission and Guiding Principles.

GROUP LEADERSHIP

Ideas for Developing Competency:

- Learn about how to manage your group's process, that is, how the team works together, while also focusing on what they do.
- Take on a problem solving situation and encourage full team participation.
- Practice during group meetings asking questions using a coaching style, that is not offering answers but asking good openended questions to broaden thinking on problems or issues.
- Develop as a workgroup a balanced measures approach to improve group performance.
- Create and support processes to openly share information with others and to include employees in decision making.
- Conduct a group team building session.
- Build a group meeting agenda with the workgroup before a meeting.
- Cross train your subordinates in each other's job.
- Collaboratively build a group vision and values statement to anchor your group's performance and behavior direction.



INFLUENCING/NEGOTIATING

Influences others; builds consensus through give and take; gains cooperation from others to obtain information and accomplish goals; seeks common ground that leads to mutually satisfying solutions.

The types of behaviors that demonstrate this competency are:

❁ Persuades Based on Facts and Reason: Uses factual arguments to persuade and influence others by appealing to reason or using data effectively. Prepares thoroughly for presentations.

❁ Adapts Style and Approach: Adapts a presentation or discussion to anticipate and appeal to the interest and sophistication of others. Appeals to others' selfinterest, identifies and addresses their sources of concern. Adapts an approach to find mutually beneficial solutions.

❁ Influences Through Others: Gains the support of influential parties and enlists their help in convincing others and getting agreement.

❁ Uses Complex Influence Strategies: Uses complex strategies, tailored to individual situations, to sell and implement ideas. For example, gets people to take ownership of ideas/plans by involving them; assembles political coalitions or behindthescene support to increase persuasive impact.

INTEGRITY/HONESTY

Instills mutual trust, respect and confidence; creates an environment that fosters high standards of ethics and insists on total integrity; behaves in a fair and ethical manner toward others, and demonstrates a sense of organizational responsibility and commitment to public service.

The types of behaviors that demonstrate this competency are:

❁ **Is Candid and Honest About Work Situations:** Behaves in a fair, ethical manner toward others. Expresses thoughts even when it would be easier not to be candid about the situation.

❁ **Acts Consistently with IRS Guiding Principles:** Behaves consistently with the Guiding Principles of the organization. Takes pride in being trustworthy. Follows through on promises. Maintains credibility by honest communication and fair treatment of others.

❁ **Acts with Integrity Even When It is Not Easy to Do So:** Acts in a fair and ethical manner even when there is a significant risk. Readily admits to having made a mistake and takes action to correct it. Confronts unethical actions in others.

❁ **Fosters Integrity and High Ethical Standards in Others:** In work situations, encourages others to conduct themselves in a fair and honest manner. Creates and supports an environment in which compassion, support, trust and ethical treatment is valued and practiced.

INTEGRITY/HONESTY

Ideas for Developing this Competency:

- Communicate high personal standards informally through daytoday contact.
- Ask employees for their expectations of you as a manager and share your style and expectations.
- Collaboratively set up principles of trust for manager and group.
- Seek out employee opinions.
- Consciously build a relationship with each person with whom you work.
- Explain the basis of your (and higher management) decisions, especially tough ones.
- Set up a system to solicit employees issues and a forum to address them.
- Act as an advocate of others, particularly supporting employees in difficult times.
- Build trust by sharing results of 360 feedback and ask for input/advice on changing behavior.
- Assertively support a workgroup ESS recommendation at a higher level.



PARTNERING

Builds strong alliances, engages in crossfunctional activities; collaborates across boundaries, and finds common ground with a wide range of stakeholders. Employs contacts to build and strengthen internal support bases. Resolves conflicts and disagreements in a positive and constructive manner.

The types of behaviors that demonstrate this competency are:

❁ Makes Informal Contacts and Builds Rapport: Identifies and uses opportunities to meet new people and develop new relationships. Builds or maintains rapport and trust with a wide circle of associates, customers, and others. Uses conflict management techniques for achieving win/win results.

❁ Develops Networks and Builds Alliances: Actively develops and maintains positive relationships with key individuals and organizations such as the private sector, NTEU, executives, employee and management organizations.

❁ Uses Networks to Strengthen Internal and External Organization Support: Strategically uses a network of relationships across business units, government, industry and the community, to support and create opportunities, and ensure the success of the organization’s long range goals.

❁ Enables the Use of Crossfunctional Activities and Collaboration: Actively supports others in building and maintaining crossfunctional relationships. Establishes policies and supports partnering and collaboration with NTEU representatives, customers, stakeholders and the community.

PARTNERING

Ideas for Developing this Competency:

- Coordinate an offsite conference, convention, or dignitary visit in collaboration with multiple business units.
- Lead a collaborative effort to integrate a system across business units or functions.
- Seek opportunities to expand networks by working on crossfunctional teams (i.e. Campus committee, Site Council).
- Partner with NTEU to host an employee recognition event.
- Partner with an external organization to address a common issue.
- Serve on an intergovernmental team or task force to expand networks and develop external awareness.
- Partner with a recognized employee organization to utilize their networks and resources to meet customer needs (for example, partnering with HIRE to establish Spanish speaking VITA sites).
- Participate in mock interviews or join mock interview cadre where available to build informal contacts and relationships.



POLITICAL SAVVY

Recognizes and acts upon the internal politics that impact the work of the organization. Approaches each problem situation with a clear perception of organizational and political reality; recognizes the impact of alternative courses of action. Uses the most effective channels to accomplish organizational goals.

The types of behaviors that demonstrate this competency are:

❁ Understands Formal Structure: Recognizes the current formal structure or capabilities of the organization and how they relate to balanced measures. Uses the formal structure of the organization, rules and regulations and internal policies and procedures, etc. to accomplish work objectives.

❁ Understands Informal Structure: Understands and uses informal structures (identifies key actors, decision-influencers, etc.) and applies this knowledge when formal structure does not work as well as desired. Understands organizational realities, networks, and accepted practices, and knows how these informal structures relate to balanced measures.



POLITICAL SAVVY (continued)

The types of behaviors that demonstrate this competency are:

❁ **Leverages Underlying Organizational Environment:** Understands the relationships within and between various groups and how the actions of one group impact others. Recognizes unspoken organizational limitations, what is and is not possible at certain times or in certain situations. Uses the organizational environment and the language that will produce the best response.

❁ **Leverages Organizational Politics:** Uses ongoing influence and political relationships within the organization, such as alliances and rivalries, to achieve a desired result that will benefit the organization. Identifies opportunities for significant organizational improvement by utilizing personal relationships within the organization.



POLITICALLY SAVVY

Ideas for Developing this Competency:

- Lobby and garner support for a proposal prior to formal presentation to customers and stakeholders.
- Establish a network of professional contacts to further your understanding of organizational culture and behavior.
- Identify potential problems and underlying interests of stakeholders/customers, and use tact in communicating recommendations for change or improvement.
- Seek developmental assignments assisting the Commissioner's Rep (CR/SCR) that promote cross functional cooperation, or take an acting assignment as the (SCR).
- Seek developmental assignments to national headquarters operations to enhance understanding of organizational relationships across the Service.
- Manage the visit of a VIP including briefings with key stakeholders and customers and other employees.



PROBLEM SOLVING

Identifies and analyzes problems; distinguishes between relevant and irrelevant information to make logical decisions; provides solutions to individual and organizational problems.

The types of behaviors that demonstrate this competency are:

❁ Breaks Down Problems, Issues or Challenges into Each of Its Parts: Sorts out tasks in order of importance. Can separate an issue or problem into its pros and cons and clarify issues.

❁ Solves Routine Problems: Understands how each part of an issue is related to and affects another. Uses this information to solve both routine and specific problems and issues.

❁ Analyzes Complex Problems and Proposes Solutions: Analyzes complex or large amounts of information and identifies potential solutions. Weighs the value of each solution to improve program and workplace effectiveness.

❁ Anticipates and Prevents Problems: Understands the relationships between work processes, systemic barriers, and needs. Understands how several parts of an issue or part of a chain of events affect each other. Understands how relationships and work processes impact other work processes that are only indirectly related. Uses this information to anticipate obstacles and take steps to prevent potential problems.

SERVICE MOTIVATION

Creates and sustains an organizational environment that motivates others to provide the quality of service essential to high performance. Shows a commitment to public service and citizenship and serves as an ambassador for the organization. Influences others toward a spirit of service and meaningful contributions to mission accomplishment.

The types of behaviors that demonstrate this competency are:

- ❁ **Makes a Personal Commitment to Public Service:** Expresses and demonstrates loyalty and commitment to the organization. Demonstrates pride in the contributions of self, team and the organization. Personally serves as an ambassador for the organization.
- ❁ **Acts to Support the Organization's Mission and Goals:** Aligns own activities and strategies with those of the larger organization. Understands, makes choices and sets priorities to fit with the mission, goals and guiding principles of the organization. Instills public trust. Officially interacts with the community as an organization representative.
- ❁ **Encourages Others to Commit to the Organization:** Inspires others to buy into the organization's Mission, Goals and Guiding Principles. Fosters enthusiasm and passion for organizational and individual excellence. Promotes corporate sponsorship in community activities.
- ❁ **Promotes a Positive Image of the Organization:** Represents the organization in national and international venues. Promotes a positive image of the organization through marketing strategies. Encourages and supports outreach programs as the worldclass leader in tax administration.

SERVICE MOTIVATION

Ideas for Developing this Competency:

- Volunteer to become the SEE (Enrolled Agent Test Coordinator) for your area.
- Lead or participate in Problem Solving Days.
- Volunteer to assist SPEC, TEC, VITA.
- Lead a VITA site during the filing season.
- Work with your local CPA association.
- Lead an effort where the organization partners to support a community need /activity, such as, school tutoring, Adopt a School, Junior Achievement.
- Teach tax topics to a community association or organization.
- Talk with your work groups regarding the importance of the IRS to our country and the importance of their work to the IRS.
- Actively participate as an IRS representative in a professional organization.



STRATEGIC THINKING

Formulates effective strategies that take into account the external influences on an organization from a national and global perspective. Examines policy issues and strategic planning with a longterm perspective leading to a compelling organizational vision. Determines objectives, sets priorities and builds upon strengths. Anticipates potential threats or opportunities.

The types of behaviors that demonstrate this competency are:

- ❁ Understands IRS Strategic Goals: Comprehends organizational goals and strategies developed by others. Prioritizes work in alignment, and acts in accordance with, set strategies, objectives, or goals.
- ❁ Links Daily Tasks to Strategies, or Long Term Perspectives: Assesses and links short term, daytoday tasks in the context of long term tax administration strategies or a long term perspective; considers whether short term goals will meet long term objectives.
- ❁ Develops Work Plans Based on Strategic Priorities: Analyzes long term issues, problems or opportunities, and uses this information to develop broadscale, longer term objectives, goals, or projects that support the larger organizational strategy.
- ❁ Develops Strategies in Support of the Mission: Develops and implements tax administration and financial strategies and allocates resources in support of the organization's mission. Deals with emerging issues, business trends and changes as a result of strategic changes. Prepares and reviews contingency plans for problems and situations that might occur.

STRATEGIC THINKING

Ideas for Developing this Competency:

- Serve on a task force team to develop business plan goals.
- Become familiar with the IRS or business unit strategic plan and analyze with your group how it relates to your work.
- Participate in your organization's strategic planning process including the development and use of feedback tools to evaluate your strategic plan and goals.
- Work with your group to align budget with organizational goals.
- Write a contingency scenario for an issue/problem facing your organization.
- Get a detail to a national program or staff position to learn integration and servicewide perspective of the organization.
- Read IRS environmental scan papers and discuss with your group what the findings mean for you and your operation.
- Conduct an environmental assessment relative to an issue of significant importance for your business unit.
- Serve on a detail to research an area/issue for the organization.
- Conduct an assessment of your operation strengths, weaknesses, opportunities, threats - to determine a new direction.



TEAMWORK

Fosters commitment, team spirit, pride and trust. Consistently develops and sustains cooperative working relationships. Continuously and openly communicates with team members. Respects and cares for team members. Encourages and facilitates cooperation within the organization.

The types of behaviors that demonstrate this competency are:

- ❁ Cooperates: Participates willingly and supports team decisions; is a good team player; does his/her share of the work. Treats others as equals.
- ❁ Keeps Team Members Informed: As a member of a team, keeps other team members informed and up to date about the group process, individual actions, or influencing events; shares all relevant or useful information.
- ❁ Expresses Positive Expectations of the Team: Expresses positive expectations of others in terms of their abilities, expected contributions, etc. Speaks of team members in positive terms. Shows respect for others. Demonstrates compassion and empathy for team members.
- ❁ Builds Teams: Acts to promote a friendly climate, good morale and cooperation (e.g., holds team gettogethers). Resolves team conflicts. Uses knowledge of goals, roles, interpersonal relationships and work processes to build effective teams and improve team performance.

TEAMWORK

Ideas for Developing this Competency:

- Use intranet resources (Team Startup; Multisite Management; Improving Team Effectiveness) to promote teamwork.
- Use the Stop, Start, Continue model to diagnose the state of the group.
- Teach your group decisionmaking processes (ie. brain storming, multivoting, consensus and majority rule). Have them select a process to use in solving a current issue or problem.
- Participate or lead a team in the design of a product, process, or system with high stakes, high visibility, tight deadlines and scarce resources; use the team members for maximum efficiency .
- Build a task force to deal with a pressing business problem that, if possible, involves integrating system(s) across business units.
- Set up regular meetings, or conference calls to share work and personal information to keep team members updated.
- Work with your group to set up a process to allow your team to control its own inventory.
- Launch a new product, system or process with a group of individuals that no one person can accomplish alone.

TEAMWORK (continued)

Ideas for Developing this Competency:

- Debrief with your group recent activity/performance accomplishments for pros and cons and implement actions to improve.
- Involve your group in developing a process to recognize team and individual achievements or events (for example, performance targets, social occasions like births, birthdays, weddings, etc).



TECHNICAL CREDIBILITY

Performs and continuously learns about current and emerging issues/developments in own field of expertise. Applies this knowledge to make technically sound operational decisions and helps expand knowledge of area throughout the organization.

The types of behaviors that demonstrate this competency are:

❁ **Utilizes Knowledge in Own Area:** Is thoroughly conversant regarding major aspects of own area, technical developments, systems, etc. Demonstrates this understanding by applying technical knowledge, experience and information to impact decisions and efforts in own area of expertise.

❁ **Demonstrates Deep Understanding of Expertise Area:** Possesses a deep understanding of developments, innovations, and changes in field of expertise. Uses this knowledge and understanding to make technically sound operational decisions that serve internal and external customers well.

❁ **Actively Contributes to Enhancing Level of Expertise Within IRS:** Expands levels of expertise by creating opportunities through crossfunctional assignments, outreach efforts and teaching opportunities that contribute to increasing the expertise within the work group, business unit, and IRS.

❁ **Recognized as an Expert in the Field:** Invited to represent the organization in congressional committees, panels and research consortiums. Sought out by others to solve problems of a highly technical nature. Attracts new talent into the organization based on credible personal reputation.

TECHNICAL CREDIBILITY

Ideas for Developing this Competency:

- Use the coaching process to enhance someone's technical skill in an area in which they are not proficient.
- Become active in a professional organization to build networks, stay current in your field and represent the Service in a positive light (Professional associations, tax practitioner or community organizations).
- Teach technical training material in your area of expertise.
- Develop technical training material in your area of expertise.
- Present technical or related subject to a professional organization to network, build self-confidence, represent the Service in a positive light and enhance technical expertise.
- Using the coaching process (i.e, not "telling"), increase the technical skills of employees and/or peers.
- Participate on National teams to redesign work processes using innovative approaches to improve business results.



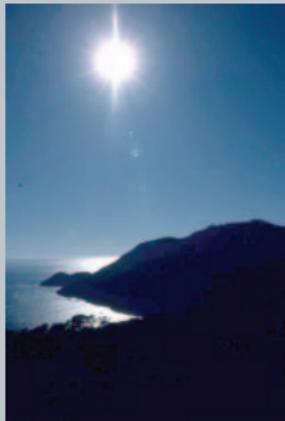


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A series of horizontal lines for writing, consisting of 24 lines in total. The first four lines are grouped together, followed by a gap, and then the remaining 20 lines are grouped together.

*No vision and you perish;
No Ideal and you're lost;
Your heart must ever cherish,
Some faith at any cost.
Some hope, Some dream
to cling to,
Some rainbow in the sky,
Some melody to sing to,
Some service that is high.*



Harriet Du Autermont

*Start with the
Right Foundation
to Build on Solid
Ground.*



FOCUSED AND FLEXIBLE



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