



Holacracy App: People Review System

App: People Review System

1.0: Performance and Development

Summary

In implementing a people review system, ARCA's goal is to gather and share the richest view of an employee possible. To support the dynamic nature of role filling within the company, we need a review system that is flexible and that supports multiple channels of information. We also believe that it is important for the system to encourage frequent conversations that provide individuals with the feedback they need to better prioritize their work and to promote continuous learning and growth.

The core purpose of ARCA's review system is:

1. To foster an ongoing conversation between lead links and circle members that helps lead links and role fillers continuously assess fitness for role.
2. To provide reliable performance data to the People & Talent circle so that we can incorporate this data into scheduled compensation reviews and recommendations for career advancement.
3. To identify development opportunities for employees in an effort to help them better express their capabilities and make progress toward their career goals.

The key components of this system include:



1. **Regular checkins** between lead links and circle members. These checkins should include expectations for the coming weeks, a sharing of individual and circle priorities, insights on recent work, specific guidance on ways to improve performance, and communication of new information that may be relevant to that individual. These regular checkins should form an ongoing conversation and, ideally, should be initiated by the role filler, not the lead link. It is important that everyone make time in their schedule for these checkins. They don't need to be more than 15 minutes, but they should ideally occur weekly for roles that constitute a majority of an individual's time, and monthly for other roles.
2. **Self assessments** performed by each employee on a quarterly basis. The basis of the self assessments will be the roles and accountabilities held by the individual. These self assessments will provide each individual an opportunity to comment on their own performance and reflect on how they are prioritizing their work. The results of self assessments will be collected by People & Talent and shared with relevant lead links so they can inform the ongoing conversations of the regular checkins.
3. **Performance snapshots** provided by lead links about each circle member. These snapshots can occur as often as needed, but should be at least quarterly. The results of these snapshots will be aggregated by People & Talent and shared back with each individual.

ARCA's people review system is designed primarily for the benefit of each employee, giving them feedback on their performance and facilitating discussions about career growth opportunities.

Design Notes

- References to @People_and_Talent in this app should be replaced to refer to whatever role or sub-circle holds the



Domain of Partner Relationships as defined in Section 5.2.5 of the Constitution, or to the role holding an accountability for setting the compensation of employees if the Domain is not delegated from the Anchor Circle.

- The company authoring this App uses the term “team member” in lieu of “Partner” or “employee.”

Adoption Requirements

- This app can be adopted as governance of whatever Circle controls the Domain of ‘Partner Relationships,’ as defined in Constitution Section 5.2.5, or by the Anchor Circle in the event that delegation of some portion of the Domain of Partner Relationships does not prevent such adoption.
- This app was designed for use with Holacracy v4.0; it may not be compatible with other versions.

Core Governance to Adopt

Edit Role: People and Talent

Add Accountability: Providing regular training sessions open to all team members on holding effective check-in meetings and providing one-on-one coaching on check-in techniques as requested by team members

Add Accountability: Providing a standard format and forum for each team member to complete a self-assessment for each of his or her roles on a quarterly basis

Add Accountability: Sharing collected self-assessment data with circle lead links as useful for the lead links to monitor feedback between team members and roles and offer feedback to enhance fit



Add Accountability: Providing a format and forum for lead links to complete “performance snapshots” that capture how team members are performing in their roles

Add Accountability: Sharing performance snapshots about each team member with that team member on a regular basis

Add Accountability: Offering guidance to team members for skills and personal development based on the results of self-assessments and performance snapshots

Add Policy: Monitoring Fit

In furtherance of the accountability for monitoring fit between team members and their roles and offering feedback to enhance that fit, in addition to other useful actions, the lead link of the General Company Circle and all subcircles must:

1. Maintain availability for regular check-ins with role fillers in the circle as such check-ins are defined by @People_and_Talent.
2. Complete performance snapshots about each role filler in the circle as such performance snapshots are defined by @People_and_Talent.

Add Policy: Self-Assessment

By accepting a role in the General Company Circle or any subcircle, a team member agrees to complete self-assessments regarding his or her performance in that role as such self-assessments are defined by @People_and_Talent.