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Pass Line: To all Foreign Service Employees from the Acting Director General
Subject: Straight Talk 2018: General Observations from the 2018 Foreign Service Selection Boards

1. Congratulations to all Foreign Service employees who were promoted this year! There were 19 Foreign Service Selection Boards that reviewed the performance of nearly 8,000 Generalists and Specialists, working in a wide variety of positions across all specializations and career tracks. The Boards were charged with making promotion recommendations based on their assessment of an employee's demonstrated capacity to take on greater responsibilities at the next level. In cases when a Board recommended more employees for promotion than the number of available opportunities, up to ten percent of the total number of employees in a competition group received a letter in their eOPF of conferral of bidding privileges for the summer 2019 or winter 2019/2020 bidding cycles.

2. I would like to thank those Foreign Service employees who volunteered to serve on the Boards this year. Assessing employee potential and recommending those who meet the criteria for promotion is a critically important task for the future of the Department. Your hard work ensured that all Foreign Service employees eligible for promotion received a fair and comprehensive review of their performance.

3. Every year, HR seeks volunteers for the Selection Boards from all career tracks and specializations who also represent the diversity of the Foreign Service. I urge all Foreign Service employees to consider service on a Selection Board in the future. Your colleagues who have served on the Boards say that the experience provides valuable insight into the promotion process and gives them confidence in the integrity of that process. Please keep an eye out later this year for a cable and Department Notice requesting volunteers for the 2019 Foreign Service Selection Boards.

4. This message summarizes the general findings and recommendations of the 2018 Boards. Some of it you've heard before! Pay particular attention to comments on recommendations for promotion, the Developmental Area, and stretch assignments. Above all, we encourage employees to articulate how their achievements support the goals of the Department of State. A

future cable will focus more specifically on recommendations for FS-01 employees who are considering whether to apply for the Senior Foreign Service “open their window.” Additional cables on other issues related to Employee Evaluation Reports (EERs) will be issued before the end of the 2018-2019 rating cycle. You can find EER-related cables on HR/PE’s intranet site at:

<https://intranet.hr.state.sbu/offices/pe/Pages/default.aspx>

WE ARE A SERVICE OF HIGH-PERFORMERS

5. The Foreign Service Promotion Process is Very Competitive! The 2018 Boards were highly impressed with the accomplishments and dedication of the Foreign Service employees whom they reviewed. They noted that many Foreign Service employees are working under extraordinarily difficult conditions, whether due to staffing gaps, difficult and unpredictable conditions in the countries where they are posted, or for other reasons. Given this high-performing pool of talent, however, the promotion process is very competitive. The Boards are required to rank order the employees whom they recommend for promotion, and in most categories, the number of positions available at the next higher level is lower than the number of employees recommended for promotion. The Boards found that they were more likely to recommend an employee for promotion when the employee, rater, and reviewer adhered to the following guidelines.

BEFORE YOU START

6. Review the Core Precepts (Decision Criteria for Tenure and Promotion in the Foreign Service): The Core Precepts are revised every three years, in coordination with American Foreign Service Association (AFSA). Employees should review the Core Precepts before drafting EERs to make sure they are familiar with the level at which a Foreign Service employee is expected to perform in each of the six competencies. While the DS-5055 no longer asks raters to address each of the six competencies individually (and there is not enough space to do that), EER drafters should view those competencies as the “building blocks for achieving informational, operational, and relational effectiveness” (as explained in the introduction to the Core Precepts) and should describe an employee’s achievements, drawing on all of the elements.

7. Review previous EERs before drafting: The Boards review the entire performance folder, placing the greatest emphasis on the most recent five years of service. Because no single EER can cover all competencies in detail, rated employees should make sure that their performance documents, especially for those from the past five years, provide a good picture of their abilities in all the competencies. Particularly look at your past Developmental Areas (formerly known as Areas for Improvement). The Board will see all of those in conjunction with one another. Keep in mind that they need to be in line with the guidance the Boards have provided below in paragraph 14.

8. Read the Instructions Carefully: The current DS-5055 form, introduced in the 2016 rating cycle, contains instructions that are different from those in the previous form. Many of the Boards indicated that too many drafters did not follow the form’s instructions. Some of their

points included:

--For the Rated Employee: Part VI (Description of Accomplishments) instructs the employee to “Describe your individual and collaborative accomplishments that advanced the Department’s Mission.” Too many rated employees focused exclusively on what they as individuals had accomplished, without mentioning any collaborative work with colleagues;

--For the Rater: Part VII (Evaluation of Performance and Potential) instructs the rater to “Appraise the employee’s accomplishments in the areas of informational, operational, and relational effectiveness. Cite specific policy and programmatic outcomes and their impact on the Department’s mission.” Many raters cited the employee’s accomplishments without explaining their impact. (See para 9 below.)

--For the Reviewer: Part VIII (Review Statement) instructs the rater to “Assess the rated employee’s preparedness for positions of greater responsibility, citing examples of performance. Describe the employee’s relations with the rater, peers, and subordinates.” Many reviewers commented on the employee’s relations with the rater but did not comment on the employee’s relations with peers or subordinates.

WHAT MAKES AN EFFECTIVE EER?

9. **Focus on the Impact:** Nearly all the 2018 Boards indicated that the strongest EERs explained the impact of the employee’s accomplishments by linking those accomplishments to mission goals. Those EERs stood apart from EERs that simply provided a list of accomplishments without explaining their impact or contribution to mission goals. Every bureau and every post has a strategic plan. Make sure you understand your role in carrying out those objectives, then write effectively to link your performance to that game plan.

--As an example, a statement such as “In the area of relational effectiveness, her greatest strength was her contribution to building an exceptional set of contacts with AMCHAM” can be made stronger by focusing on the impact: “She recognized that AMCHAM was a key player in our work to oppose the government’s efforts to block the sale of American goods in local stores. Thanks to her extensive network of contacts, we were able to expand sales and open the market to U.S. goods.”

10. **Rater and Reviewer Statements should be Complementary:** The Boards indicated that many rater and reviewer statements sounded duplicative rather than complementary. The Boards recommended that raters and reviewers avoid using the same examples. On the other hand, a few Boards noticed cases in which raters and reviewers contradicted each other. In several instances, reviewers expressed agreement with the rater that an employee was ready for greater responsibility even when the rater had not made such a statement. The Boards recommended raters and reviewers discuss their respective statements and work out any contradictions, if possible. In cases where the rater and reviewer disagree, the reviewer should explain why s/he disagrees with the rater on a given point.

11. Stretch Assignments and Supervisory Duties: The cover page of the EER only shows the employee's personal grade and does not indicate the grade of the position the employee is occupying. Therefore, the rater should highlight when an employee is in a stretch assignment (or has taken on higher-level duties in an acting capacity), and comment on how well the employee is handling the additional responsibilities of the higher grade. Also, if the rated employee has supervisory duties, the rater should explicitly state how many employees the rated employee supervises and provide an assessment of how well the rated employee carries out those supervisory duties.

12. Proofread, and Ask Others to Proofread: It is not surprising that after staring at a computer screen for long periods of time, many employees overlook spelling and grammatical errors as well as spacing and formatting problems. The Boards recommend that rated employees not only proofread their EERs multiple times, but also ask a trusted friend or colleague to proofread their EERs.

--Avoid jargon and unexplained acronyms: Keep in mind that every Selection Board includes a public member who is not familiar with State Department acronyms or jargon. Also, every Board reviewing Specialists includes Generalist board members who may not be familiar with terminology commonly used by employees in that field. Boards reviewing Generalists include Generalists from all five career tracks/cones, so keep in mind that some board members might not understand all of the cone-specific terminology.

--Check for incorrect word usage: The Boards noticed numerous mistakes involving words used incorrectly. Examples include diffuse (defuse), reign (rein), moral (morale), by-in (buy-in), duel (dual), principle (principal and vice versa), compliment (complement), corroboration (collaboration), and lynch pin (linch pin).

--Print your EER to check spacing and cut-off sentences: If drafters are not using an Open Net computer (for example, if they are teleworking) or are using a browser other than Internet Explorer, the line spacing can be thrown off, resulting in some statements being cut off at the end. The Boards recommend employees print their EERs to check line spacing and ensure that no statement is cut off at the end.

--White Space: Employees should check that there is sufficient white space to ensure their EERs are easier to read, but not so much that important or relevant information is sacrificed.

WHERE'S THE BEEF? PROMOTION RECOMMENDATIONS MUST BE SUPPORTED WITH EVIDENCE

13. Recommendations for Promotion: Several Boards stated that because the vast majority of EERs contained recommendations for promotion, they gave little to no weight to those recommendations on their own. Rather, they focused on whether the recommendations were supported by convincing examples of the rated employee's accomplishments and explanations of how those accomplishments contributed to mission goals from all three of the EER contributors. An unsubstantiated recommendation for promotion lessened the credibility of the recommendation.

NO ONE IS PERFECT

14. **Developmental Area:** The Boards indicated that the EERs they read showed that the Developmental Area (formerly called the Area for Improvement) still is widely misunderstood or improperly used.

--Developmental Areas should be credible: The Boards want to see a credible Developmental Area that identifies the competency in which the employee has room for growth. In contrast, a non-credible Developmental Area casts doubt on whether the rater and the employee have had a real discussion of the employee's development and on whether the employee is serious about her/his own professional development.

--Developmental Areas should be tied to current performance: Many raters fail to tie the Developmental Area to current performance but instead refer to something the employee should seek to do in the future that is not possible in the employee's current position. Statements such as "now that s/he has completed a tour as a CAO, s/he should seek an assignment as an IO..." or "now that s/he has worked in both the NIV and IV units, s/he should seek an assignment to an ACS position..." provide no real information about the employee's current performance and what s/he needs to do to be ready to take on greater responsibility.

--Training is not a Developmental Area: While the EER instructions state that the Developmental Area should not be used to cite a need for formal or informal training, too many raters nevertheless cite the need for training as the Developmental Area.

--Importance of addressing previous Developmental Areas: The Boards underscored the importance of employees demonstrating how they addressed previous Developmental Areas. If an employee has changed jobs, s/he should discuss with the new rater any previous Developmental Areas in which s/he wants to work, and the rater should comment on the employee's progress in that area.

IT'S YOUR CAREER!

15. **Planning your Career:** The Boards noted that assignments in a variety of locations (including in Washington and in hardship posts) enabled candidates to demonstrate a broad range of skills. In addition, the Boards looked favorably upon employees who pursued and succeeded in varied roles, progressively embracing more responsibility and challenging positions. The Boards expected employees at higher grades to take on increasing levels of management responsibility over both personnel and resources, e.g., supervision of colleagues or overseeing budget or strategic planning.

16. **Breadth vs. Depth:** The Boards reviewing employees at the mid-levels and above indicated that successful employees had demonstrated depth in their own cone or specialization as well as breadth in developing multifunctional skills. A multifunctional or out-of-cone assignment was viewed positively if it clearly enabled the employee to develop useful skills. Overall, the employees whom Boards considered most competitive for future advancement to

the senior ranks were those who demonstrated cross-cutting capability in all jobs and who articulated in their EERs the way they had used an out-of-cone or multifunctional assignment to enhance their in-cone or specialist skills.

17. HR's Office of Performance Evaluation (HR/PE) posts information on performance-related topics on its intranet site (listed above) throughout the year. In addition, HR/PE organizes webinars and DVCs on EER-related topics. If your post or a group of regional posts would like to have an individual or tailored briefing, we would be happy to accommodate. Please contact HR/PE Program Analyst, Jamila Moumeni, at MoumeniJS@state.gov for more information.

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