

INTERIM LEADERSHIP ASSESSMENT

30 or 60 Day Leadership Observation

A copy of this form should be provided to the potential leader at the initial meeting so they understand what will be observed. The current leader should complete the online assessment based on their observations and review it with the potential leader and next-level leader at the final onboarding meeting.

Potential Leader: _____ **Potential Role:** _____

Direct Leader: _____ **Interim Period:** 30 Days / 60 Days

Start Date: _____ **Review Date:** _____

TO THE POTENTIAL LEADER: Welcome to your Interim Leadership Period! We see leadership potential in you and want to give you an opportunity to grow, lead, receive coaching, and determine whether this is the right next step.

Great leaders are developed, and development requires opportunities to lead, receive feedback, make adjustments, and grow. Use this assessment as a guide throughout your interim period. These are the areas your leader will be observing and coaching you in.

1. Did the potential leader serve all agreed-upon dates during the interim period?

Yes | No

If no, explain: _____

2. Were they consistently punctual, prepared, and ready to lead?

Yes | Mostly | No

Comments: _____

3. Did they recognize problems and bring appropriate solutions?

Consistently | Sometimes | Needs Development | Not Yet Observed

Example: _____

4. Did they appropriately and promptly communicate problems involving Rockstars? *(Consider no-shows, late arrivals, team conflict, areas needing coaching, or other concerns.)*

Consistently | Sometimes | Needs Development | Not Yet Observed

Example: _____

5. How did they handle an uncomfortable leadership situation? *(Consider correction, accountability, conflict, enforcing an expectation, or having a difficult conversation.)*

Consistently | Sometimes | Needs Development | Not Yet Observed

Example: _____

6. When something did not go as planned, how did they respond? *(Did they take ownership, stay flexible, and work toward a solution?)*

Consistently | Sometimes | Needs Development | Not Yet Observed

Example: _____

7. Did they intentionally get to know the people they were leading?

Consistently | Sometimes | Needs Development | Not Yet Observed

Comments: _____

8. Do their Rockstars appear to feel known, cared for, and valued?

Consistently | Sometimes | Needs Development | Not Yet Observed

Comments: _____

9. Do they know meaningful details about the people they lead? *(Look for evidence that they are learning people's stories, families, work, needs, and important circumstances.)*

Consistently | Sometimes | Needs Development | Not Yet Observed

Example: _____

10. Did the team naturally recognize and respond to them as a leader?

Consistently | Sometimes | Needs Development | Not Yet Observed

Example: _____

11. Did they demonstrate the ability to build and develop their team? *(Consider whether they encouraged others, created connection, delegated appropriately, invited participation, and helped others succeed.)*

Consistently | Sometimes | Needs Development | Not Yet Observed

Example: _____

12. Did they communicate expectations and direction clearly?

Consistently | Sometimes | Needs Development | Not Yet Observed

Example: _____

13. Were they able to bring people with them rather than simply tell people what to do?

Consistently | Sometimes | Needs Development | Not Yet Observed

Example: _____

14. How did they respond to feedback and coaching?

Received & Applied It | Defensive or Resistant | Not Enough Opportunity to Observe

Example: _____

15. Did they demonstrate awareness of how their words, emotions, and actions affected others?

Consistently | Sometimes | Needs Development | Not Yet Observed

Example: _____

16. Which Leadership Standards were most evident during the interim period?

Do It for the One | Serve with Excellence | Take Ownership | Go the Extra Mile | Stay Flexible | Bring the Fun

Comments: _____

17. Did the potential leader represent NorthRock's mission, vision, values, and culture well?

Consistently | Sometimes | Needs Development | Not Yet Observed

Example: _____

Based on the full interim period, what is your recommendation?

- ☐ Move forward – confirm in leadership
- ☐ Extend – continue interim leadership with specific development goals
- ☐ Continue developing – return to current role and continue growing