



Job Requirements Matrix

1 Introduction

The following matrix sets out the attributes and behaviours to which Castalia staff should aspire. The matrix has levels for all staff, and then specific requirements for Analysts, Senior Analysts, Managers, Directors and Practice Leaders. The pages following the matrix describe some of the terms in the matrix in more detail.

2 How we'll Use the Matrix

At Annual Performance Reviews, managers will review with team members how their attributes and behaviours compare with those in the matrix at their level. The evaluation may then be summarized in a numerical score for each column, as follows:

1. Well short of expectations, urgent remedial action required
2. Needs work to meet expectations in a number of areas
3. Meets most expectations
4. Meets expectations in all respects, exceeds in some
5. Exceeds expectations in all respects

The scores across each column can then be aggregated into a total score, on the same scale; no fractional scores allowed

Our expectation is that when people first start in a position, they will typically score at level 2—clearly, when you first start something, you don't perform as well as you or others would like. After a year or two working in a position we'd expect people to reach level 3. After another year or two people may reach level 4 or 5.

There will be a range of salaries for each position. People who score lower on numerical ranking will tend to be paid lower on the salary range, while people who score higher will tend to be paid higher. However, there will be no exact correlation, as other factors such as the value of work done, and a person's market value, as well as their location, will also be considered in setting pay.

People who are at level 4 or 5 will be considered for promotion. Promotion would generally be warranted if the person also seemed likely to be able to perform at least at level 2 on the next level.

The matrix is only one input to evaluation of performance. It is intended to help everyone understand what Castalia is looking for, to develop themselves so they can be good at their jobs, and to be fair, reasonable, balanced and thorough in appraising performance and development needs. It is only a guide to good judgement, not a substitute for it.

	Theory, Analytics, Knowledge	Communication	Working Style and Team	External Relationship & Business Development	Financial Contribution	Experience (years)
All	<p>Works things out in a logical and structured way</p> <p><i>Microeconomic Thinking:</i> Knows at least the basics and applies appropriately</p> <p>Well informed, with a good general knowledge of history, geography, politics and current affairs</p>	<p>Communicates effectively</p> <p><i>Written:</i> Meets the Castalia Plain English Standards and requirements of the Style Guide (given help on structuring the story)</p> <p><i>Presentation:</i> Meets requirements of the Presentation Guide</p> <p><i>Oral:</i> Speaks articulately, confidently and respectfully; listens effectively</p>	<p><i>Processes:</i> Follows Castalia Processes routinely</p> <p><i>Time:</i> Manages own time efficiently.</p> <p><i>Reliability:</i> Delivers agreed outputs on time and to required quality standards</p> <p><i>Guidance:</i> Seeks and respects guidance and peer review to ensure quality and manage risk</p> <p><i>Development:</i> Works with staff manager to prepare and implement Professional Development Plan</p> <p><i>Team:</i> Projects a positive and supportive attitude. Respectful of other team members</p>	<p>Confident professional manner with clients and others</p> <p>Well presented</p> <p>Well informed and able to discuss topics of interest to clients and others</p>	<p>Meets or exceeds whatever targets are set for winning and doing work</p>	

	Theory, Analytics, Knowledge	Communication	Working Style and Team	External Relationship & Business Development	Financial Contribution	Experience (years)
Research Associate	<p><i>Microeconomic Thinking:</i> Knows and applies appropriately</p> <p><i>Relevant Sector Knowledge:</i> Basic knowledge of how at least one works</p>	<p><i>Written:</i> Expected to still need help on structuring reports</p>	<p><i>Tasks.</i> Reliably completes assigned tasks on time and to required standard</p> <p>Able to perform the following tasks to a high standard if given clear direction:</p> <ul style="list-style-type: none"> ▪ Research a defined topic and produce a summary note, table or graphic that is clear, correct and fully sourced ▪ Prepare graphics and presentations from sketches and outlines to meet Castalia's presentation standards ▪ Arrange meetings, coordinate logistics, manage document organization and other project and practice administration tasks <p><i>Team</i> Finds practical ways to help other team members</p>	<p>Prepares successful EOIs and contributes to successful Proposals following Castalia guidelines, processes, and policies</p>	<p><i>Billable revenue:</i> meets agreed targets (typical range: X–Y).</p> <p><i>Project management:</i> no target</p> <p><i>Work won:</i> no target</p>	0 to 3

	Theory, Analytics, Knowledge	Communication	Working Style and Team	External Relationship & Business Development	Financial Contribution	Experience (years)
Analysts	<p><i>Microeconomic Thinking:</i> Knows and applies appropriately</p> <p><i>Analytic Techniques:</i> understands and applies at least one</p> <p><i>Relevant Sector Knowledge:</i> Basic knowledge of how at least one works</p> <p><i>Domain Knowledge:</i> Understands and applies concepts from at least one Domain</p>	<p><i>Written:</i> Expected to still need help on structuring reports</p>	<p><i>Tasks:</i> Reliably completes assigned tasks on time and to required standard</p> <p>Takes responsibility for tasks, and for understanding how they fit into the big picture</p> <p><i>Team:</i> Finds practical ways to help other team members</p>	<p>Starting to develop personal relationships with some clients</p> <p>Prepares EOIs and contributes to successful Proposals following Castalia's guidelines, processes, and policies</p>	<p><i>Billable revenue:</i> meets agreed targets (typical range: X–Y)</p> <p><i>Project management:</i> no target</p> <p><i>Work won:</i> no target</p>	0 to 3

	Theory, Analytics, Knowledge	Communication	Working Style and Team	External Relationship & Business Development	Financial Contribution	Experience (years)
Senior Analysts	<p><i>Microeconomic Thinking:</i> knows and applies appropriately. Starting to innovate in micro-economic analysis on Castalia projects</p> <p><i>Analytic Techniques:</i> Experienced and reliable in applying at least one with little supervision. Developing knowledge of a second</p> <p><i>Other Relevant Frameworks:</i> Basic knowledge and application of at least one</p> <p><i>Relevant Sector Knowledge:</i> Strong grasp of at least one. Developing knowledge of at least one other sector</p> <p><i>Domain Knowledge:</i> Strong grasp of at least one Domain</p>	<p><i>Written:</i> Becoming proficient at structuring the story and reports</p> <p><i>Presentation:</i> Developing innovative and effective visual communication skills. Delivers presentations confidently and engagingly</p>	<p><i>Tasks:</i> Takes on larger and more complex tasks, scopes them in terms of content, quality and time required, agrees with project manager, and delivers as agreed</p> <p>Takes responsibility for tasks, and for understanding how they fit into the big picture</p> <p><i>Projects:</i> Contributes to conceptualization of projects. Takes on project management roles at times</p> <p><i>Time:</i> Projects future workloads to remain productive but not overloaded</p> <p><i>Team:</i> Finds practical ways to help other team members, including supporting more junior staff</p>	<p>Wins confidence of some members of client's team</p> <p>Learning to communicate what Castalia is, and the value that Castalia can add to organizations</p> <p>Start to identify and follow leads for Castalia, especially in relation to projects they are working on</p> <p>Effectively manages successful EOIs and Proposals following Castalia's guidelines, processes, and policies</p>	<p><i>Billable revenue:</i> meets agreed targets (typical range: X–Y)</p> <p>NB: Typical salary multiple: N–M</p> <p><i>Project management:</i> no target</p> <p><i>Work won:</i> no target</p>	2 to 6

	Theory, Analytics, Knowledge	Communication	Working Style and Team	External Relationship & Business Development	Financial Contribution	Experience (years)
Managers	<p><i>Microeconomic Thinking:</i> Strong grasp of micro-economics, consistently applied in Castalia projects</p> <p><i>Analytic Techniques:</i> Mastery of at least one. Able to manage analysts in their application of at least two</p> <p><i>Other Relevant Frameworks:</i> Basic knowledge and application of at least one</p> <p><i>Relevant Sector Knowledge:</i> Strong grasp of at least two. Developing knowledge of at least one other sector</p> <p><i>Domain Knowledge:</i> Strong grasp of at least one Domain. Basic knowledge of one other</p>	<p><i>Written:</i> Structures reports and story lines effectively. Coaches others in meeting Castalia standards</p> <p><i>Presentation:</i> Uses effective visuals. Presents engagingly and convincingly</p> <p><i>Oral:</i> Manages conversations to ensure desired results are achieved</p>	<p><i>Projects:</i> Delivers projects on time, to Castalia quality standards and client satisfaction, at least cost</p> <p>Leads conceptualisation of projects. Communicates clearly what needs to be done, by whom, when, and why</p> <p>Spots project risks early, communicates these to Project Director, manages the risks effectively</p> <p><i>Time:</i> Helps everyone on the team to manage their time by realistically forecasting inputs required and resolving conflicts</p> <p>Works effectively with other Project Managers to manage staff scheduling and/or conflicts</p> <p><i>Team:</i> Creates an enthusiastic and supportive team environment</p> <p>Coaches team members to bring out their best. Provides helpful feedback</p>	<p>Manages client expectations and relationships to keep the client happy while meeting Castalia's quality and commercial targets</p> <p>Keeps relationship alive after project close to generate follow on work</p> <p>Builds relationships with others in industry, generates leads, communicates who Castalia is and the value Castalia can add</p> <p>Helps to define and close new contracts</p> <p>Effectively manages successful EOIs and Proposals following Castalia's guidelines, processes, and policies</p>	<p><i>Billable revenue:</i> meets agreed targets (typical range: X–Y)</p> <p><i>Project management:</i> delivers projects to minimum cost</p> <p>Is on or under budget across portfolio of projects</p> <p><i>Work won:</i> [target]</p>	3 to 50

	Theory, Analytics, Knowledge	Communication	Working Style and Team	External Relationship & Business Development	Financial Contribution	Experience (years)
Directors	<p><i>Microeconomic Thinking:</i> Strong grasp of micro-economics, consistently applied in Castalia projects</p> <p><i>Analytic Techniques:</i> Able to supervise project managers and analysts in application of a range of analytic techniques</p> <p><i>Other Relevant Frameworks:</i> Basic knowledge and application of several other relevant frameworks. Able to assess when they should be applied and to supervise others in their application</p> <p><i>Relevant Sector Knowledge and Domains:</i> Mastery of the relevant sector and domains for the practice area</p> <p><i>Knowledge management:</i></p>	<p><i>Written:</i> Ensures all writing in projects directed meets the Castalia Standards and requirements of the Style Guide. Guides team members in structuring the story. Own writing is crisp, clear and engaging</p> <p><i>Presentation:</i> Ensures all presentations in projects under own direction meet the Presentation Guide, and use effective visuals, and are presented engagingly and convincingly</p> <p><i>Oral:</i> Manages conversations to ensure desired results are achieved. Able to defend ideas confidently under pressure</p>	<p><i>Team management:</i> Allocates resources to ensure deadlines are met and work with Practice Leader to ensure a sustainable and profitable balance between workload and resources</p> <p><i>Projects:</i> Delivers projects on time, to Castalia quality standards and client satisfaction, at least cost</p> <p>Leads conceptualisation of projects. Communicates clearly what needs to be done, by whom, when, and why</p> <p>Spots project risks early, communicates these to Practice Leader, manages the risks effectively</p> <p>Supports PL in managing practice. Manages the time and development of at least two more junior team members. Collaborates effectively with other Directors and Practice</p>	<p>Defines one or more niches in which to lead Castalia's BD</p> <p>Manages client expectations and relationships to keep the client happy while meeting Castalia's quality and commercial targets</p> <p>Keeps relationship alive after project close to generate follow on work</p> <p>Builds relationships with others in industry, generates leads, communicates who Castalia is and the value Castalia can add</p> <p>Takes the lead in originating, marketing, negotiating, and closing new contracts</p>	<p><i>Billable revenue:</i> meets agreed targets (typical range: X–Y)</p> <p>Ensures that portfolio of projects meets profitability targets</p> <p><i>Work won:</i> Net revenue will typically be at least NZ\$300,000</p>	4 to 50

	Theory, Analytics, Knowledge	Communication	Working Style and Team	External Relationship & Business Development	Financial Contribution	Experience (years)
	Works with Practice Leader to ensure that the practice manages the necessary knowledge effectively, develops that knowledge in staff, and innovates		<p>Leaders</p> <p><i>Processes:</i> Ensures all work under own direction follows Castalia’s processes</p> <p><i>Development.</i> Allocates work strategically to ensure people are able to develop their skills in line with agreed goals</p> <p><i>Team.</i> Inspires enthusiasm in the work of the practice</p> <p>Ensures that people in the team feel supported and encouraged. Recognises and celebrates success, and provides helpful feedback, including on where improvements are needed</p> <p>Helps Practice Leader identify recruitment needs within practice area and leads recruitment efforts for own team</p>			
Practice Leaders	<i>Microeconomic Thinking:</i> Strong grasp of micro-economics,	<i>Written:</i> Ensures all writing in Practice meets the Castalia	<i>Practice management:</i> <ul style="list-style-type: none"> ▪ Short term: allocate resources to ensure 	<i>Takes a longer-term view:</i> Plans business development,	<i>Billable revenue:</i> meets agreed targets (typical range: X–Y)	7 to 50

Theory, Analytics, Knowledge	Communication	Working Style and Team	External Relationship & Business Development	Financial Contribution	Experience (years)
<p>consistently applied in Castalia projects</p> <p><i>Analytic Techniques:</i> Able to supervise project managers and analysts in application of a range of analytic techniques</p> <p><i>Other Relevant Frameworks:</i> Basic knowledge and application of several other relevant frameworks. Able to assess when they should be applied and to supervise others in their application</p> <p><i>Relevant Sector Knowledge and Domains:</i> Mastery of the relevant sector and domains for the practice area</p> <p><i>Thought leadership:</i> Innovates in solving sector problems, and establishes and</p>	<p>Standards and requirements of the Style Guide. Structures the story where necessary. Own writing is crisp, clear and engaging.</p> <p><i>Presentation:</i> Ensures all presentations in practice meet the Presentation Guide, and use effective visuals, and are presented engagingly and convincingly.</p> <p><i>Oral:</i> Manages conversations to ensure desired results are achieved. Able to defend ideas confidently under pressure.</p>	<p>deadlines and financial targets are met</p> <ul style="list-style-type: none"> ▪ Medium term: ensures a sustainable and profitable balance between workload and resources <p><i>Projects:</i> Ensures that across the practice projects are completed on time, to Castalia quality standards and client satisfaction, at least cost.</p> <p><i>Processes:</i> Ensures all work in the practice follows Castalia’s processes</p> <p><i>Time:</i> Works with other managers to ensure that all projects have the resources needed to complete them, and all staff are productive but not overloaded</p> <p><i>Development:</i> Allocates work strategically to ensure people can develop their skills in line with agreed goals</p>	<p>prioritises marketing efforts. This includes:</p> <ul style="list-style-type: none"> ▪ Provides thought leadership on where sector is/should be going ▪ Maintaining and expanding existing client relationships ▪ Developing new and profitable client relationships <p><i>Whole firm business development:</i> Sees linkages between work and thinking, both within practice area and across Castalia, and translate these linkages into opportunities for new work</p> <p>Finds ways to develop the brand</p> <p>Helps others develop effective client relationships</p>	<p>Ensures that Practice Portfolio of projects meets profitability targets</p> <p><i>Work won:</i> [target]</p>	

Theory, Analytics, Knowledge	Communication	Working Style and Team	External Relationship & Business Development	Financial Contribution	Experience (years)
<p>maintains Castalia's reputation for rigorous, innovative and practical analysis in the practice area</p> <p><i>Knowledge management:</i> Works with CEO to ensure that the practice manages the necessary knowledge effectively, develops that knowledge in staff, and innovates</p>		<p><i>Team:</i> Inspires enthusiasm in the work of the practice</p> <p>Ensures that people in the practice feel supported and encouraged. Recognises and celebrates success, and provides helpful feedback, including on where improvements are needed</p> <p>Maintains relationships with people in all Castalia offices to ensure offices work in an integrated and seamless manner</p> <p>Identifies recruitment needs within practice area and participates in recruitment</p>			

	Theory, Analytics, Knowledge	Communication	Working Style and Team	Experience
All	<p>Works things out in a logical and structured way</p> <p>Well informed, with a good general knowledge of history, geography, politics and current affairs</p> <p>Well informed and able to discuss topics of interest to clients and others</p>	<p>Communicates effectively</p> <p><i>Written:</i> Meets the Castalia Plain English Standards and requirements of the Style Guide (given help on structuring the story)</p> <p><i>Presentation:</i> Meets requirements of the Presentation Guide</p> <p><i>Oral:</i> Speaks articulately, confidently and respectfully; listens effectively</p> <p>Confident professional manner with clients and others</p>	<p><i>Processes:</i> Follows Castalia Processes routinely</p> <p><i>Time:</i> Manages own time efficiently</p> <p><i>Reliability:</i> Delivers agreed outputs on time and to required quality standards</p> <p><i>Guidance:</i> Seeks and respects guidance and peer review to ensure quality and manage risk</p> <p><i>Development:</i> Works with manager to prepare and implement Professional Development Plan</p> <p><i>Team:</i> Projects a positive and supportive attitude. Respectful of other team members</p>	
BD Associate	<p><i>Relevant Sector Knowledge:</i> Basic understanding of Castalia's sectors, niches and areas of expertise</p> <p><i>Analytics:</i> Basic understanding of how to assess and report data</p>	<p>Consistently produces accurate, visually appealing and error-free presentations and capability statements that effectively sell Castalia's expertise, and are in line with the guidance of the practice leader or manager</p>	<p><i>Winning Work Processes:</i> Consistently creates winning proposals and EOIs in line with Castalia's guidelines, processes and policies</p> <p><i>BD Processes:</i> Understands all Castalia BD processes, procedures and standards</p>	0-3
Senior BD Associate	<p><i>Relevant Sector Knowledge:</i> Thorough understanding of Castalia's sectors, niches and areas of expertise</p>	<p>Consistently produces accurate, visually appealing and error-free presentations and capability statements that effectively sell</p>	<p><i>Winning Work Processes:</i> Consistently creates winning proposals and EOIs in line with Castalia's guidelines, processes and policies with minimal guidance or</p>	1-3

	Theory, Analytics, Knowledge	Communication	Working Style and Team	Experience
	<i>Analytics:</i> Strong grasp of how to assess, report and present data	Castalia's expertise with minimal guidance	direction Consistently identifies relevant opportunities for each practice, and circulates notices to the right practice Ensures Quals database, Staff CVs, and our Partners database are comprehensive, accurate, and reflect our standards <i>BD Processes:</i> Understands all Castalia BD processes, procedures and standards and can train staff on applying these effectively	
BD Manager	<i>Relevant Sector Knowledge:</i> In-depth understanding of Castalia's sectors, niches and areas of expertise <i>Analytics:</i> Thorough understanding of how to assess, report, present and manage data, including the effectiveness of business development efforts <i>Marketing:</i> In-depth understanding of marketing strategies that best suit Castalia BD efforts, including assessment of effectiveness <i>Thought leadership:</i> Establishes and maintains Castalia's reputation for rigorous, innovative and practical analysis in BD efforts	Consistently produces and manages others to produce accurate, visually appealing and error-free presentations and capability statements that effectively sell Castalia's expertise	<i>Winning Work Processes:</i> Consistently creates and manages others to produce winning proposals and EOIs in line with Castalia's guidelines, processes and policies Consistently identifies relevant opportunities for each practice, and circulates notices to the right practice and can train staff on how to search opportunities effectively Ensures Quals database, Staff CVs, and our Partners database are comprehensive, accurate, and reflect our standards Regularly updates Castalia's website and social media presence in line with Castalia's guidelines, processes and	3+

Theory, Analytics, Knowledge	Communication	Working Style and Team	Experience
<p><i>Knowledge management:</i> Works to ensure that the BD team manages the necessary knowledge effectively, develops that knowledge in staff</p>		<p>policies</p> <p><i>BD Processes:</i> Understands all Castalia BD processes, procedures and standards, can train staff on applying these effectively, monitors effectiveness of BD processes, and creates additional processes or tools as necessary</p>	

3 Terms in the Matrix

This section elaborates on some of the terms in the matrix, organized by the column they appear in.

3.1 Theory, Analytics and Knowledge

Micro-economic thinking means the ability to understand and apply the foundation principles of economics to help solve clients' problems. Key concepts are contained in Milgrom and Roberts 'Economics, Organization and Management'.

Analytic Techniques include:

- Financial Analysis and Financial Modelling
- Finance (theory of finance, including corporate and project finance and an understanding of accounting concepts)
- Economic Cost-Benefit analysis
- Econometrics
- Linear programming

Other Relevant Frameworks include

- Macro-economics (including fiscal, monetary and exchange rate theory)
- Law
- Engineering
- Management theory
- Systems thinking and non-linear dynamics

Relevant Sectors are:

- Electricity (including renewable generation)
- Water and sanitation
- Transport
- Telecommunications

Less relevant but still useful sectors to know about include:

- Fuels: Oil, Gas, Coal, Biofuels
- Agri-business
- Social infrastructure

'Basic knowledge' of a sector means:

- Understands how the basic engineering and physics of the sector—how things are produced, transported and transformed;

- Knows the main cost drivers at each stage of the process, standard cost benchmarks (e.g. \$/MW for various generating capacities, typical tariff levels), as well cost structure in terms of fixed, variable and sunk costs
- Knows the underlying economics of the sector including which parts are monopolies, which competitive, which contestable, and the main practical and policy issues that result
- Understands something of the commercial relationships between actors in the sector, including the value chain
- Knows some of the main players (organizations and individuals) in the sector
- Knows who Castalia’s clients are and their main interests and concerns

‘Strong Grasp’ means as above, but more detailed and extensive knowledge, e.g. knows most of the major players, knows the details of key transactions or projects, readily cites a large number of standard benchmarks, and so on.

Relevant Domains are:

- Regulation of Natural Monopolies
- Infrastructure Financing
- Competitive Electricity Market Design and Analysis
- Climate Change policy and economics
- Competition law and policy

3.2 Communication

‘Communicates’ effectively means:

- Explains ideas so others understand them
- Able to persuade others of the rightness of a course of action
- Understands what others are thinking, feeling, and trying to express

Written:

- Castalia Standards
<https://castalia.sharepoint.com/Castalia%20Wiki/Plain%20English%20Standard.aspx>
- Style Guide
<https://castalia.sharepoint.com/Castalia%20Wiki/Style%20Guide.aspx>

Presentation—Presentation Guide

<https://castalia.sharepoint.com/Castalia%20Wiki/Castalia%20Presentation%20Guide.aspx>

Oral—Listens effectively means follows the techniques and principles of active listening

https://en.wikipedia.org/wiki/Active_listening

3.3 Working Styles and Team

Castalia's Processes are those documented in the Book of Castalia.

'Time management' includes the ability to:

- Keep busy but not be overloaded
- Meet deadlines
- Signal to Manager about upcoming events/issues
- Seek help where appropriate

4 Financial Contribution

'Meets targets' means meeting the billable revenue and other targets

5 Experience

Experience means the number of years of relevant post-graduation work experience that someone in this position would have.