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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Situation Analysis** | | | | | | | | | | | | | | | | | | | | | | | | |
| **Describe Performance Discrepancy:** | | | | | |  | | | | | | | | | | | | | | | | | | |
| **Team Member(S)** | | |  | | | | | | | | | | | | | **Frequency** | | | |  | | | | |
| **Date (S):** | | |  | | | | | | | **Location:** | | | |  | | | | | | | | | | |
| **Element:**  **(Responsibility)** | | **Conditions:**  **(Organizational Responsibility)** | | | | | | | | | | | | **Competencies:**  **(Team Member Responsibility)** | | | | | | | | | | |
| **Ability** | | Resources are sufficient? | | | | | | Yes | | | | No | | Technical skills are sufficient? | | | | | | | | Yes | No | |
| Technologies are sufficient | | | | | | Yes | | | | No | | Interpersonal skills are sufficient? | | | | | | | | Yes | No | |
| What reinforcers contribute to behaviors? (list) | | | | | |  | | | | | | Knowledge of job and organizational procedures is sufficient? | | | | | | | | Yes | No | |
| What inhibits behavior? List | | | | | |  | | | | | | Appropriate degree of organizational power sufficient? | | | | | | | | Yes | No | |
| **Element:**  **(Responsibility)** | | **Clarity of Expectations**  **(Organizational Responsibility)** | | | | | | | | | | | | **Commitment**  **(Team Member Responsibility)** | | | | | | | | | | |
| **Motivation** | | Objectives & goals clear? | | | | | | Yes | | | | No | | Interest in task is sufficient? | | | | | | | | Yes | No | |
| Metrics aligned and available? | | | | | | Yes | | | | No | | Confidence is sufficient? | | | | | | | | Yes | No | |
| Feedback is appropriate, timely, and specific? | | | | | | Yes | | | | No | | Willingness to assume responsibility is sufficient? | | | | | | | | Yes | No | |
| Rewards and consequences are commensurate with actual performance? | | | | | | Yes | | | | No | | Alignment with organizational goals is appropriate? | | | | | | | | Yes | No | |
| **Performance Potential and Actual Leadership Style Employed To Date** | | | | | | | | | | | | | | | | | | | | | | | | |
| **Goal Not Being Achieved** | | | | |  | | | | | | | | | | | | | | | | | | | |
| **Task No: 1** |  | | | | | | | | **A = 0 1 2** | | | | | | **M = 0 1 2** | | **Potential:** | |  | | **Actual Style** | | |  |
| **Task No: 2** |  | | | | | | | | **A = 0 1 2** | | | | | | **M = 0 1 2** | | **Potential:** | |  | | **Actual Style** | | |  |
| **Task No: 3** |  | | | | | | | | **A = 0 1 2** | | | | | | **M = 0 1 2** | | **Potential:** | |  | | **Actual Style** | | |  |
| **Task No: 4** |  | | | | | | | | **A = 0 1 2** | | | | | | **M = 0 1 2** | | **Potential:** | |  | | **Actual Style** | | |  |
| **Task No: 5** |  | | | | | | | | **A = 0 1 2** | | | | | | **M = 0 1 2** | | **Potential:** | |  | | **Actual Style** | | |  |
| **Actual Leadership Style Used** | | | | | | | | | | | | | | | | | | | | | | | | |
| **Effective** | | | | | | | **Style** | | | | | | **Ineffective** | | | | | | | | | | | |
| **Directing**  **Coaching / Problem Solving**  **Collaborating**  **Delegating** | | | | | | | * **1 🡨** * **2 🡨** * **3 🡨** * **4 🡨** | | | | | | **Dictating**  **Enabling**  **Over Involving or Micromanaging**  **Abdicating** | | | | | | | | | | | |
| **Resources Needed** | | | | | | | | | | | | | | | | | | | | | | | | |
| Time | | | | Training | | | | | | | New Equipment | | | | | | | Other: | | | | | | | |
| Manpower | | | | Authority | | | | | | | Technical Expertise | | | | | | | Other: | | | | | | | |
| Funding | | | | Facilities | | | | | | | Access to Equipment | | | | | | | Other: | | | | | | | |
| **Support Needed** | | | | | | | | | | | | | | | | | | | | | | | | |
| Clear Expectations | | | | Feedback | | | | | | | Flying Cover | | | | | | | Other: | | | | | | | |
| Mentoring | | | | Coaching | | | | | | | Encouragement | | | | | | | Other: | | | | | | | |
| Decisions Made | | | | Delegation | | | | | | | Consequences | | | | | | | Other: | | | | | | | |
| Overall Assessment of Situation: | | | | | | | | | | | | | | | | | | | | | | | | |

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| **Action Planner / Performance Contract** | | | | | | | | | |
| **Project Name** |  | | | | | | **Final Completion Date:** | |  |
| **Team Member(S)** |  | | | | | | | | |
| **Team Members Performance Potential** | | | | | | | | | |
| **Task:** | **Description:** | | | | | **Responsibility** | | **Due Date** | |
| **Task No: 1** |  | | | | |  | |  | |
| **Resources & Support Needed:** | | | | | | | **Decision Authority** | |
|  | | | | | | |  | |
| **Task:** | **Description:** | | | | **Responsibility** | | | **Due Date** | |
| **Task No: 2** |  | | | |  | | |  | |
| **Resources & Support Needed:** | | | | | | | **Decision Authority** | |
|  | | | | | | |  | |
| **Task:** | **Description:** | | | | | **Responsibility** | | **Due Date** | |
| **Task No: 3** |  | | | | |  | |  | |
| **Resources & Support Needed:** | | | | | | | **Decision Authority** | |
|  | | | | | | |  | |
| **Task:** | **Description:** | | | | **Responsibility** | | | **Due Date** | |
| **Task No: 4** |  | | | |  | | |  | |
| **Resources & Support Needed:** | | | | | | | **Decision Authority** | |
|  | | | | | | |  | |
| **Task:** | **Description:** | | | | **Responsibility** | | | **Due Date** | |
| **Task No: 5** |  | | | |  | | |  | |
| **Resources & Support Needed:** | | | | | | | **Decision Authority** | |
|  | | | | | | |  | |
| **Check Points & Milestones** | | **Due Date:** | **Key Metric** | **Target** | | | | **Required Communications:** | |
|  | |  |  |  | | | |  | |
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| What steps will be taken if performance does not achieve desired outcomes within the specified timeframe? | | | | | | | | | |
| **Employee Signature** | **Date:** | **Manager or Supervisor Signature** | | | | | | **Date:** | |
|  |  |  | | | | | |  | |