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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:**  |
|  |  |  |  |