
UNIFIED FIRE AUTHORITY



POSITION TASK BOOK BATTALION CHIEF

The Task Book is Assigned to: _____ (Print Trainee Name)

The Task Book is initiated by Battalion Chief: _____ (Print)

Signature: _____

Date Initiated: _____

SCOPE AND INTENT

The task book provides a basic framework of the necessary skills UFA Battalion Chiefs should possess. It is intended to identify the required training and provide guidance and direction to evaluators/trainers (Battalion Chiefs) and trainees on areas of focus for development, education, and insight into preparing for the promotion to Battalion Chief.

Trainees should have several evaluators/trainers to ensure they receive well-rounded feedback to provide the best possible experience. The task book introduces the basic skills necessary to step into the role of Battalion Chief. These skills are not intended to be all-inclusive, and completing the task book is only the beginning step in developing the skills of a Battalion Chief.

The task book is divided into the Battalion Chief Leadership Academy and the skills/tasks. The skills/tasks are designed to be completed in the classroom, during scenario-based training, in the station environment, and during actual incidents. The trainees seek opportunities from their evaluator/trainer (current Battalion Chief) to perform or conduct tasks in the book.

The trainee is responsible for managing the task book from start to finish. This includes initiation, attending all the Battalion Chief Leadership Academy sessions, seeking other opportunities for training and development, and asking a mentor to assist them in their journey to be a Battalion Chief. The trainee's are responsible for maintaining the original copy and keeping it for their records. Upon completion, a copy of the task book will be placed in the trainee's personnel file.

To be eligible to test in the 2027 Battalion Chief Promotional process and all future Battalion Chief Promotional Processes, trainees must have attended all of the Battalion Chief Leadership Academy sessions and completed the Battalion Chief Leadership Academy Task Book components. Successful completion of the entire Battalion Chief Task Book is required within six (6) months of promotion.

PREREQUISITES TO INITIATE A TASK BOOK

All employees wanting to prepare for the role of Battalion Chief are encouraged to begin their development journey using the task book as their guide. Prior to starting and getting tasks signed off by an evaluator/trainer, the employee must meet specific requirements:

1. Must be a UFA Captain/Staff Captain with a minimum of one year as a UFA Captain in an operational assignment
2. Must be within two years of eligibility to test for Battalion Chief (minimum of 9 years in a UFA Firefighter position)

INITIATING A TASK BOOK

1. Obtain a task book from PowerDMS, Forms, Admin & Planning, Task Books, Battalion Chief Task Book, and review the criteria.
2. Any Battalion Chief or higher-ranking Officer with UFA can initiate the task book and provide initial directions to the trainee to begin working on the task book.

Beginning in 2027, the task book will be valid for two testing cycles, including the current and previous. Any signed task older than four years will be considered expired and will not count in the review and certification process.

LEADERSHIP ACADEMY

BATTALION CHIEF LEADERSHIP ACADEMY SESSIONS

The session instructor is responsible for validating a trainee's attendance. To qualify as having completed, trainees must attend 70% of each session.

SKILLS/TASKS – EVALUATOR/TRAINER

The evaluator/trainer must be a promoted officer. At a minimum, the evaluator/trainer must be promoted to the rank of the position for which you are evaluating. An evaluator/trainer will only sign off on tasks completed in their presence and under their supervision.

As an evaluator/trainer, you are expected to hold the trainee accountable for their demonstration of understanding a skill/task. Be thorough in your assessment of the trainee's knowledge, skills, and abilities being assessed. You must complete all documentation in the task book for skills/tasks to be considered complete. This includes correct dates, proper signatures in the "Task Section", and a fully completed "Evaluation Record" for each experience.

As an evaluator/trainer, you are the one verifying the trainee is proficient in the skill/task, so provide detailed and honest feedback in both your conversations and written evaluation. The Promotional Work Group will contact evaluators/trainers upon review of each task book to verify experience records. If you choose to sign a skill/task as complete, it is critical that you feel comfortable with the trainee's performance of the skill/task. As an evaluator/trainer, you must exercise your discretion on the trainee's ability to successfully perform the task without supervision.

COMPLETING TRAINING AND SKILLS/TASKS

BATTALION CHIEF LEADERSHIP ACADEMY

The leadership academy is designed to prepare trainees with core leadership skills and effective strategies for handling leadership challenges and provide the necessary knowledge, skills, and abilities to advance their careers. The leadership academy is broken down into four sessions.

SKILLS/TASKS

Upon demonstrating proficiency for a specified skill/task, your evaluator/trainer will, at a minimum, sign off on that skill/task by entering the completion date and signing under the Evaluator Signature Section. The evaluator/trainer should also specify where the skill/task was completed, which is recorded in the box marked CODE. The evaluator/trainer should also leave feedback in the Comment section. There is additional room for detailed feedback on the evaluation record. For each skill/task to be evaluated, trainees will demonstrate their proficiency through multiple opportunities to exhibit depth of training and competency of the skill/task.

CODING COMPLETION

Skills/tasks may be completed in a variety of settings. Evaluators/trainers may evaluate the trainee in various capacities, such as training, scenario-based training, tabletop exercises, and incidents. It is important to document where individual skills/tasks were observed. The list below provides directions for evaluators/trainers to CODE attendance at the Battalion Chief Leadership Academy, or a skill/task based on the situation observed. Evaluators/trainers will record the incident or event type in which each skill/task was performed using the following:

BLA	Battalion Chief Leadership Academy Attendance
CST	Classroom, scenario-based training, tabletop or acquired structure, etc.
STA	Station environment (leadership, administrative tasks, etc.)
SF	Structure Fire (Evaluation Record Required)
I	Incident (Evaluation Record Required)
WI	Working Incident (Evaluation Record Required)

To complete the skill/task for Structure Fire, Incident, and Working Incident, the trainee must be a rank of Battalion Chief or acting-in as a Battalion Chief during the incident.

It is preferred that the trainee perform skills/tasks on incidents when opportunities are provided. When actual incidents are unavailable to the trainee, scenario-based training and tabletop exercises may be used. However, skills/tasks signed off in this manner must have a minimum of three evaluations. The intent is to ensure the individual's competence, which may require more than three records.

DEPTH OF TRAINING

The basis of documenting training in a task book is to record the training and education that the trainee has experienced. Therefore, the trainee should attempt to have the evaluator(s)/trainer(s) document *each* time a skill/task has been performed to demonstrate the depth of the training and competency of that skill/task. Multiple signatures in each skill/task are highly recommended.

FYI LEADERSHIP COMPETENCIES

As part of the "Leadership" section in the task book, Skill #5 requires trainees to demonstrate the FYI Leadership Competencies for the rank of Battalion Chief. Several evaluation sheets highlight each competency at the end of the task book. This provides insight, guidance, and feedback on each competency chosen for Battalion Chief. As part of completing Skill #5, these forms should be filled out and included with the completed task book for final submission and review.

COMPLETING THE TASK BOOK CHECKLIST

- Attended all leadership academy sessions and have verification signatures of attendance
- Qualified evaluators/trainers have signed off on all skills/tasks
 - Battalion Chiefs who are also considered "Trainees" may not sign off on task books.
- All information is complete (dates, locations, incident numbers (when applicable), applicable comments, and all required signatures)

Upon completion of the task book, the following should occur:

1. If newly promoted, the trainee will meet with their evaluator/trainer (if applicable), Battalion Chief, and Operations Chief for a final review of the task book and interview regarding their experience going through the process.
2. If the trainee is on the Registry and has been acting in, they will meet with their current Battalion Chief (or evaluator/trainer) and Operations Chief for a final review of the task book and an interview to ensure all tasks have been satisfactorily completed.

3. If not on the Registry, the trainee may meet with their Battalion Chief to review the task book and discuss lessons learned and areas to continue concentrating on as they prepare to test for Battalion Chief. Task books **cannot** be certified until the trainee is ranked on a Battalion Chief Promotional Registry.

During the review, the trainee may be asked how the skills/tasks were completed and what was learned during their experience. If the trainee is eligible and the task book is validated as complete and the officers conducting the review are satisfied with the trainee's proficiency in the individual's skills, the Battalion Chief and Operations Chief will complete the Verification of the Completed Task Book and submit it to the Emergency Services Assistant Chief for review by the Promotional Workgroup.

SKILL/TASK	CODE	Evaluator Signature (Initial & Date)	Evaluation Record #	Comments
Leadership Academy				
BLA #1 Leadership Concepts, Administrative Processes, and Legal Considerations	BLA			
BLA #2 L-960 All Hazards Division/Group Supervisor (National Incident Management System (NIMS) compliant ICS 400 Advanced ICS for Command and General Staff or NWCG I-400 is a prerequisite for BLA #2)	BLA			
BLA #3 FDSOA - Incident Safety Officer	BLA			
BLA #4 Operations- Strategic Decision-Making, Test Preparation, a day in the life of a Battalion Chief	BLA			
LEADERSHIP				
1. Exhibits and practices the UFA Expectations of Leadership (STA)				
2. Shows competency in day-to-day decision-making and general leadership skills (STA)				
3. Demonstrates the ability to coach, counsel, and mentor subordinates (STA,, CST)				
4. Communicates Leader's Intent (STA, CST)				
5. Demonstrates the "Battalion Chief Leadership Competencies" from FYI Leadership (See appendix) (CST, STA)				
6. Establish cohesiveness among assigned resources: <ul style="list-style-type: none"> ✓ Provides for open communication ✓ Seek commitment ✓ Set expectations for accountability ✓ Focus on the team result (CST, STA)				

SKILL/TASK	CODE	Evaluator Signature (Initial & Date)	Evaluation Record #	Comments
Incident Response				
7. Properly implement ICS on multiple unit responses: ✓ <i>Follow the chain of command</i> ✓ <i>Use appropriate ICS terminology (SF, I, WI)</i>				
8. Effectively operate as an Initial Incident Commander at an emergency scene (SF, I, WI)				
9. Decision-Making Under Pressure: Exercise sound judgment during time-critical, high-stress situations (SF, I, WI)				
10. Incident Action Planning: Develop and implement an Incident Action Plan (IAP), integrating strategy, tactics, and resource allocation. (I, WI, CST)				
11. Conflict Resolution: Address inter-agency conflicts swiftly and diplomatically (I, WI, CST)				
12. Incident Forecasting: Anticipate escalation needs and request additional resources proactively (I, WI, CST)				
13. Properly use SOGs for the following incidents:				
a. Multi-Family Residential Working Fire (SF, WI, CST)				
b. Commercial Working Fire (SF, WI, CST)				
c. Wildland & Urban-Interface Fire (I, WI, CST)				
d. Bomb Threats (I, WI, CST)				
e. Hazmat Incident (I, WI, CST)				
f. Technical Rescue: Understand specialized operational requirements and resources for non-typical incidents (I, WI, CST)				
g. Establish other ICS positions during an expanding incident (I, WI, CST)				

SKILL/TASK	CODE	Evaluator Signature (Initial & Date)	Evaluation Record #	Comments
14. Ensure instructions and assignments are clear and concise (I, SF, WI)				
15. Conduct an After-Action Review (I, SF, WI)				
16. Demonstrate the ability to address the following command tasks: arrival report and size-up. Mayday, and PAR checks (I, SF, WI, CST)				
Incident Response-EMS				
17. Demonstrates the ability to perform Battalion Chief duties at a triage/mass casualty incident (I, WI, CST)				
18. Demonstrates the ability to perform Battalion Chief duties at a Rescue Taskforce incident (I, WI, CST)				
Community and Government				
19. Attend a political function/public meeting and appropriately represent UFA (STA)				
20. Respond to and address a concern raised by a citizen. Follow UFA policies, and appropriately address the concerns or refer the citizens to the proper channels within UFA (STA, CST)				
Administrative Duties				
21. Area Coverage: Manage battalion coverage during ongoing incidents or large-scale emergencies (STA, CST, BLA)				
22. Demonstrate ability to obtain information regarding Battalion duties for the day by accessing department emails, staffing rosters, and daily calendars (STA, CST, BLA)				

SKILL/TASK	CODE	Evaluator Signature (Initial & Date)	Evaluation Record #	Comments
23. Demonstrate the ability to complete all aspects of an effective morning Operations briefing (STA, CST, BLA)				
24. Communicate information to Captains and ensure compliance with department policies (I.e., New memos, policies, procedures, etc.) (STA)				
25. Ensure the completion of LMS, PowerDMS, Fire and Medical Reports, and Fleet, Medical and Equipment checkoffs (STA)				
26. Ensure all crew members meet the current policy regarding uniforms, personal appearance, and PPE (STA)				
27. Develop a training/ improvement plan for a crew or individual. Provide coaching, mentoring, and training to assist them in correcting the deficiency (STA)				
28. Understand the timecard approval process (STA, BLA)				
29. Demonstrates knowledge and proficiency with the following forms:				
a. Supervisor's report of accident (STA, BLA, CST)				
b. First aid report (STA, BLA, CST)				
c. Exposure report (STA, BLA, CST)				

SKILL/TASK	CODE	Evaluator/Trainer Signature (Initial & Date)	Evaluation Record #	Comments
30. Demonstrate understanding of the following policies:				
a. Professional Standards & Ethics (STA, BLA, CST)				
b. Harassment, Sexual Harassment, Discrimination & Retaliation (STA, BLA, CST)				
c. Drug & Alcohol Testing (STA, BLA, CST)				
d. Discipline (STA, BLA, CST)				
e. Demonstrate proficient use of Telestaff STA, BLA, CST)				
Expectation-Inspections and Investigations				
31. Pre-Incident Planning: Review and manage pre-plans for high-risk occupancies and target hazards (STA, BLA, CST)				
32. Conduct an initial fire cause determination inspection at a given fire scene. Determine the need to activate Special Enforcement Investigation (STA, BLA, CST)				
Communications and Radio Procedures				
33. Demonstrate proper usage of radios and MDT on both emergency and non-emergency scenes (SF, I, WI)				
34. Demonstrate proficiency in mobile radio use, including programmable BK radios or equivalent. (Including scan, buttons, changing zones, finding lockdown channels, ER communications, neighboring jurisdiction communications, emergency button activations, etc.) (SF, I, WI)				

SKILL/TASK	CODE	Evaluator/Trainer Signature (Initial & Date)	Evaluation Record #	Comments
Safety				
35. Safety Officer Role: Assume or delegate the safety officer role when needed. (I, WI, SF)				
36. Accountability Systems: Ensure implementation of PAR (Personnel Accountability Report) and RIC (Rapid Intervention Crew). (I, WI, SF)				
37. Behavioral Health Awareness: Promote wellness and monitor personnel for critical incident stress. (STA, BLA, CST)				
38. Demonstrate tasks that comply with the latest safety standards and policies (SF, I, WI)				
39. Perform all supervisory tasks safely and proficiently, and ensure crew members and subordinates perform tasks safely (SF, I, WI, CST)				

UNIFIED FIRE AUTHORITY



VERIFICATION OF COMPLETED TASK BOOK FOR THE POSITION OF **BATTALION CHIEF**

I verify that all tasks have been performed and are complete with signatures.

Employee Signature: _____ Date: _____

Battalion Chief Name: (print) _____ Date: _____

Battalion Chief Signature: _____

Operations Chief Name: (print) _____ Date: _____

Operations Chief Signature: _____

AGENCY CERTIFICATION

I certify that _____ (Employee) has met all the requirements and that the qualifications for this position have been issued.

Emergency Services Assistant Chief's Signature _____
Date: _____

Evaluation Record

(Make Copies of Blank Evaluation Record to use)

Evaluation Record _____

Trainee Information

Employee Name (print): _____

Trainee Position on Incident/Event: _____

Station Assignment _____ Phone Number: _____

Evaluator/Trainer Information

Evaluator/Trainer Name (print): _____

Evaluator/Trainer Position on Incident/Event: _____

Station Assignment _____ Phone Number: _____

Incident/Event Information

Incident/Event Name: _____ Reference (Incident #): _____

Date: _____ Duration: _____

Incident Kind: Structure Fire, Medical Call, MVA, Wildfire, All-Hazard, Training, other(specify) _____

Location (full address) _____

Management Tyle (circle one) Type 5 Type 4 Type 3

OR Training Complexity (circle one): Low Moderate High

Evaluator/Trainer's Recommendation

(Initial only one line as appropriate)

_____ **1)** The tasks initialed and dated by me in the task book have been performed under my supervision in a satisfactory manner. The trainee has successfully performed all tasks in the PTB for the position. I have completed the Final Evaluator/Trainer's Verification section and recommend that the trainee be considered for agency certification.

_____ **2)** The tasks initialed and dated by me in the task book have been performed under my supervision in a satisfactory manner. However, opportunities were not available for all tasks (or all uncompleted tasks) to be performed and evaluated on this assignment. An additional assignment is needed to complete the evaluation.

_____ **3)** The trainee did not satisfactorily complete certain PTB tasks; additional training, guidance, or experience is recommended.

_____ **4)** The individual is deficient in performing tasks in the PTB for the position, and additional training, guidance, or experience is recommended prior to another training assignment.

Please share additional remarks/recommendations below:

Evaluator/Trainer's Signature: _____ Date: _____

Evaluator/Trainer's Relevant Qualification: (or agency certification) _____

The "For Your Improvement" (FYI)

The book provides definitions and examples to explore each competency, describing each competency and how it operates. It also identifies resources and tools to assist with development.

FACTOR I: THOUGHT

Making Complex Decisions

12. Decision Quality: Making good and timely decisions that keep the organization moving forward.

<p>Skilled:</p> <ul style="list-style-type: none"> • Makes sound decisions, even in the absence of complete information • Relies on a mixture of analysis, wisdom, experience, and judgment when making decisions • Considers all relevant factors and uses appropriate decision-making criteria and principles • Recognizes when a quick 80% solution will suffice 	<p>Less Skilled:</p> <ul style="list-style-type: none"> • Approaches decisions haphazardly or delays decision-making • Makes decisions based on incomplete data or inaccurate assumptions • Ignores different points of view or makes decisions that impact short-term results at the expense of longer-term goals
<p>Talented:</p> <ul style="list-style-type: none"> • Decisively makes high-quality decisions, even when based on incomplete information or in the face of uncertainty • Actively seeks input from pertinent sources to make timely and well-informed decisions • Skillfully separates opinions from facts • Is respected by others for displaying superior judgment 	<p>Overused:</p> <ul style="list-style-type: none"> • Applies an overly rigorous or methodological decision process to all issues, even where experience and intuition can work equally well • Is overly confident about own decision-making capability; reluctant to delegate decision-making to others or hesitant to involve others when generating solutions

If the employee is less skilled or overuses the competency, provide feedback in the comments. If this competency is a strength of the employee, provide feedback in the comments. Resources can be found in the FYI Book starting on **Page 137**.

A Path to Improvement Plan document is attached to the packet for the employee's use.

Evaluator/Trainer's

Comments: _____

Evaluator/Trainer's Signature: _____ **Reviewed Date:** _____

FACTOR II: RESULTS

Taking initiative

2. Action Oriented: Taking on new opportunities and tough challenges with a sense of urgency, high energy, and enthusiasm.

Skilled: <ul style="list-style-type: none">• Readily takes action on challenges without unnecessary planning• Identifies and seizes new opportunities• Displays a can-do attitude in good and bad times• Steps up to handle tough issues	Less Skilled: <ul style="list-style-type: none">• Is slow to act on an opportunity• Spends too much time planning and looking for information• May be overly methodical, taking too long to act on a problem• Is reluctant to step up to challenges; waits for someone else to take action
Talented: <ul style="list-style-type: none">• Quickly and decisively takes action in fast-changing, unpredictable situations• Shows a tremendous amount of initiative in tough situations; is exceptional at spotting and seizing opportunities	Overused: <ul style="list-style-type: none">• Pushes solutions before adequate analysis• May waste energy by immediately tackling an issue, forcing rework along the way• Is so ready to act alone, misses counsel from others

If the employee is less skilled or overuses the competency, provide feedback in the comments. If this competency is a strength of the employee, provide feedback in the comments. Resources can be found in the FYI Book starting on **Page 13**.

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Evaluator/Trainer's

Comments: _____

Evaluator/Trainer's Signature: _____ **Reviewed Date:** _____

Focusing on Performance

1. Ensures Accountability: Holding self and others accountable to meet commitments.

<p>Skilled:</p> <ul style="list-style-type: none"> • Follows through on commitments and makes sure others do the same • Acts with a clear sense of ownership • Takes personal responsibility for decisions, actions, and failures • Establishes clear responsibilities and processes for monitoring work and measuring results • Designs feedback loops into work 	<p>Less Skilled:</p> <ul style="list-style-type: none"> • Fails to accept a fair share of personal responsibility • Gathers little information about how things are going • Provides inadequate feedback; fails to help others adjust course midstream • Prefers to be one of many accountable for an assignment
<p>Talented:</p> <ul style="list-style-type: none"> • Assumes responsibility for the outcomes of others • Promotes a sense of urgency and establishes and enforces individual accountability in the team • Works with people to establish explicit performance standards • Is completely on top of what is going on and knows where things stand • Provides balanced feedback at the most critical times 	<p>Overused:</p> <ul style="list-style-type: none"> • May not give appropriate credit to others • Strictly enforces accountability; doesn't consider situations that are beyond individuals' control • Focuses too much on numbers and hard data; measurement becomes a goal and a pursuit of its own

If the employee is less skilled or overuses the competency, provide feedback in the comments. If this competency is a strength of the employee, provide feedback in the comments. Resources can be found in the FYI Book starting on **Page 1**.

A Path to Improvement Plan document is attached to the packet for the employee's use.

Evaluator/Trainer's

Comments: _____

Evaluator/Trainer's Signature: _____ **Reviewed Date:** _____

FACTOR III: PEOPLE

Building Collaborative Relationships

20. Interpersonal Savvy : Relating openly and comfortably with diverse groups of people

<p>Skilled:</p> <ul style="list-style-type: none">• Relates comfortably with people across levels, functions, culture, and geography• Act with diplomacy and tact• Builds rapport in an open, friendly, and accepting way• Builds constructive relationships with people both similar and different to self• Picks up on interpersonal and group dynamics	<p>Less Skilled:</p> <ul style="list-style-type: none">• Builds few relationships• Engages with people in immediate work area only• Is uncomfortable when interacting with people different from self• Expresses points of view in a blunt or insensitive manner• Shows little interest in others needs
<p>Talented:</p> <ul style="list-style-type: none">• Proactively develops relationships with a wide variety of people• Builds immediate rapport, even when facing difficult or tense situations• Understands interpersonal and group dynamics and reacts in an effective manner• Engages input from others constantly and listens with empathy and concern	<p>Overused:</p> <ul style="list-style-type: none">• Is focused on understanding group and interpersonal dynamics at the expense of getting results• Makes ineffective decisions due to a strong need to be liked• May be seen as lacking authenticity

If the employee is less skilled or overuses the competency, provide feedback in the comments. If this competency is a strength of the employee, provide feedback in the comments. Resources can be found in the FYI Book starting on **Page 235**.

A Path to Improvement Plan document is attached to the packet for the employee's use.

**Evaluator/Trainer's
Comments:** _____

Evaluator/Trainer's Signature: _____ **Reviewed Date:** _____

Influencing People

7. Communicates Effectively: Developing and delivering multi-mode communications that convey a clear understanding of the unique needs of different audiences.

<p>Skilled:</p> <ul style="list-style-type: none"> • Is effective in a variety of communication settings: one-on-one, small and large groups, or among diverse styles and position levels • Attentively listens to others • Adjusts to fit the audience and the message • Provides timely and helpful information to others across the organization • Encourages the open expression of diverse ideas and opinions 	<p>Less Skilled:</p> <ul style="list-style-type: none"> • Has difficulty communicating clear written and verbal messages • Tends to always communicate the same way without adjusting to the diverse audience • Does not take the time to listen or understand others' viewpoints • Does not consistently share information others need to do their jobs
<p>Talented:</p> <ul style="list-style-type: none"> • Delivers messages in a clear, compelling, and concise manner • Actively listens and checks for understanding • Articulates messages in a way that is broadly understandable • Adjusts communication content and style to meet the needs of diverse stakeholders • Models and encourages the expression of diverse ideas and opinions 	<p>Overused:</p> <ul style="list-style-type: none"> • May overinform, giving out information that isn't helpful or harms productivity • May try to win with style and communication skills over fact and substances • May invest too much time crafting communication

If the employee is less skilled or overuses the competency, provide feedback in the comments. If this competency is a strength of the employee, provide feedback in the comments. Resources can be found in the FYI Book starting on Page 75.

A Path to Improvement Plan document is attached to the packet for the employee's use.

Evaluator/Trainer's Comments: _____

Evaluator/Trainer's Signature: _____ **Reviewed Date:** _____

37. Drives Vision and Purpose: Painting a compelling picture of the vision and strategy that motivates others to action.

<p>Skilled:</p> <ul style="list-style-type: none"> • Talks about future possibilities in a positive way • Creates milestones and symbols to rally support behind vision • Articulates the vision in a way everyone can relate to • Creates organization-wide energy and optimism for the future • Shows personal commitment to the vision 	<p>Less Skilled:</p> <ul style="list-style-type: none"> • Fails to personally connect with the organization’s vision • Has difficulty describing the vision in a compelling way • Cannot simplify enough to help people understand complex strategy • Struggles to energize and build excitement in others
<p>Talented:</p> <ul style="list-style-type: none"> • Articulates a compelling, inspired, and relatable vision • Communicates the vision with a sense of purpose about the future • Makes the vision sharable by everyone • Instills and sustains organizational-wide energy for what is possible 	<p>Overused:</p> <ul style="list-style-type: none"> • May lack follow-through to execute the vision • Communicates at a high level too often • May lack patience when others don’t share the same vision and sense of purpose

If the employee is less skilled or overuses the competency, provide feedback in the comments. If this competency is a strength of the employee, provide feedback in the comments. Resources can be found in the FYI Book starting on ***Page 439***.

A Path to Improvement Plan document is attached to the packet for the employee's use.

Evaluator/Trainer's

Comments: _____

Evaluator/Trainer’s Signature: _____ **Reviewed Date:** _____

FACTOR IV: SELF

Being Authentic

10. Courage: Stepping up to address difficult issues, saying what needs to be said.

Skilled: <ul style="list-style-type: none">• Readily tackles tough assignments• Faces difficult issues and supports others who do the same• Provides direct and actionable feedback• Is willing to champion an idea or position despite dissent or political risk	Less Skilled: <ul style="list-style-type: none">• Shies away from difficult issues or challenging assignments• Expresses point of view in an indirect manner• Avoids giving corrective feedback• Fails to take a stand on important issues
Talented: <ul style="list-style-type: none">• Tackles difficult issues with optimism and confidence• Shares sensitive messages or unpopular points of view in a motivating manner• Lets people know where they stand, honestly and sensitively• Volunteers to tackle and lead tough assignments	Overused: <ul style="list-style-type: none">• Struggles to identify which battles to take on and when to back down• Shares point of view on everything and could be seen as intimidating or a "know-it-all"• Communicates bluntly and fails to recognize the impact on relationships with others• Neglects own work in favor of getting involved in multiple difficult issues

If the employee is less skilled or overuses the competency, provide feedback in the comments. If this competency is a strength of the employee, provide feedback in the comments. Resources can be found in the FYI Book starting on **Page 113**.

A Path to Improvement Plan document is attached to the packet for the employee's use.

Evaluator/Trainer's

Comments: _____

Evaluator/Trainer's Signature: _____ **Reviewed Date:** _____

36. Instills Trust: Gaining the confidence and trust of others through honesty, integrity, and authenticity.

<p>Skilled:</p> <ul style="list-style-type: none"> • Follows through on commitments • Is seen as direct and truthful • Keeps confidences • Practices what he/she preaches • Shows consistency between words and actions 	<p>Less Skilled:</p> <ul style="list-style-type: none"> • Lacks consistent follow-through on commitments • Betrays confidences and covers up mistakes • Misrepresents facts for personal gain • Has trouble keeping confidences • Makes promises but doesn't always keep them
<p>Talented:</p> <ul style="list-style-type: none"> • Gains the confidence and trust of others easily • Honors commitments and keeps confidences • Expresses self in a credible and transparent manner • Models high standards of honesty and integrity 	<p>Overused:</p> <ul style="list-style-type: none"> • May push openness and honesty to the point of being disruptive • May come across as overly judgmental of those not quite as overtly authentic

If the employee is less skilled or overuses the competency, provide feedback in the comments. If this competency is a strength of the employee, provide feedback in the comments. Resources can be found in the FYI Book starting on Page 427.

A Path to Improvement Plan document is attached to the packet for the employee's use.

Evaluator/Trainer's

Comments: _____

Evaluator/Trainer's Signature: _____ **Reviewed Date:** _____

Being Open

29. Demonstrates Self-Awareness: Using a combination of feedback and reflection to gain productive insight into personal strengths and weaknesses

Skilled: <ul style="list-style-type: none">• Reflects on activities and impact on others• Proactively seeks feedback without being defensive• Is open to criticism and talking about shortcomings• Admits mistakes and gains insight from experiences• Knows strengths, weaknesses, opportunities, and limits	Less Skilled: <ul style="list-style-type: none">• Does not reflect on past mistakes• Acts defensively when given feedback• Is unaware of own skills and interpersonal impact• Makes excuses and blames others
Talented: <ul style="list-style-type: none">• Seeks and acts on feedback from a wide variety of people• Willingly admits and takes responsibility for mistakes and shortcomings• Views criticism as helpful• Can articulate the causes behind own feelings and moods	Overused: <ul style="list-style-type: none">• Overthinks or overanalyzes feedback from others• May be self-critical to the point of risking credibility and appearing insecure• Spends too much time on building self-insight and not enough time on making meaningful changes to behavior or skills

If the employee is less skilled or overuses the competency, provide feedback in the comments. If this competency is a strength of the employee, provide feedback in the comments. Resources can be found in the FYI Book starting on Page 343.

A Path to Improvement Plan document is attached to the packet for the employee's use.

Evaluator/Trainer's

Comments: _____

Evaluator/Trainer's Signature: _____ **Reviewed Date:** _____

Being Flexible and Adaptable

26. Being Resilient: Rebounding from setbacks and adversity when facing difficult situations

<p>Skilled:</p> <ul style="list-style-type: none"> • Is confident under pressure • Handles and manages crises effectively • Bounces back from setbacks • Grows from hardships and negative experiences 	<p>Less Skilled:</p> <ul style="list-style-type: none"> • Gets easily rattled in high-pressure situations • Exhibits low energy and motivation during times of stress and worry • Acts defensively when faced with criticism or roadblocks • Takes too long to recover from setbacks
<p>Talented:</p> <ul style="list-style-type: none"> • Stays focused and composed in stressful situations • Maintains a positive attitude and forward-thinking approach despite troubling circumstances or setbacks • Takes constructive action to navigate difficulties or obstacles • Is viewed as a source of confidence in high-stress situations 	<p>Overused:</p> <ul style="list-style-type: none"> • Is unreasonably confident and optimistic; could miss the early signs of trouble • Fails to show emotions in appropriate circumstances; comes across as cold and uncaring • May allow stress to pile up, risking burnout • Minimizes the implications or severity of the situation

If the employee is less skilled or overuses the competency, provide feedback in the comments. If this competency is a strength of the employee, provide feedback in the comments. Resources can be found in the FYI Book starting on [Page 307](#).

A Path to Improvement Plan document is attached to the packet for the employee's use.

Evaluator/Trainer's

Comments: _____

Evaluator/Trainer's Signature: _____ **Reviewed Date:** _____

***PATHS TO IMPROVEMENT PLAN
EMPLOYEE WORKSHEET***
****Print additional pages as needed***

Competency _____

Date to be completed _____

1. What are the Weaknesses (Less skilled or Overused)	
2. Comments received	
3. What is the Goal	
4. What is my plan (Action Items)	(Consider "Tips to develop" in the FYI book for your referenced competency)
5. Notes: Review and re-evaluate	