

Teammate Coaching

Documentation Process

The goal of Teammate Coaching is to work with the teammate to solve performance problems and to improve the work of the teammate, team, and department. Teammates who respond positively to coaching and improve their performance can become valued contributors to the success of the team. Teammates who fail to improve may need to be placed on a Performance Improvement Plan.

Documentation is an essential first step a leader should take to address a concern and encourage development of a teammate. Leaders should recognize areas in need of improvement and address those areas with the teammate as soon as possible. Partnering with Human Resources during the Documentation Process is not necessary, but assistance is available if needed.

The Documentation Process consists of a development discussion and completion of the Documentation Form.

When a teammate's performance is not meeting agency or leadership expectations, it is important to determine the cause. Questions to consider include:

- Have I clearly communicated expectations to the teammate?
- Are the expectations I have set reasonable?
- Does the teammate have the necessary resources, knowledge, skills, and abilities?
- Has the teammate been adequately trained in the areas of concern?
- Are other teammates with similar skill sets able to successfully meet expectations?
- Are personal issues affecting the teammate's performance?

DEVELOPMENT DISCUSSION

The development discussion is not a formal improvement plan or a punishment. It is a way for a leader to understand the underlying causes of any teammate's performance concerns. A development discussion is held with the goal of ensuring both teammate and leader fully understand expectations and the discussion should result in a positive outcome. During the discussion:

- Demonstrate your belief in their ability to improve.
 - Express positive encouragement and confidence in them, but also recognize that they are the only person who can improve their performance.
- Describe the performance concern to the teammate in detail, providing examples.
- Discuss whether circumstances exist that limit the teammate's performance, such as time, training, tools, and temperament.
 - Do they have the ability to perform the task or accomplish the objectives?
 - Determine how to remove any barriers.
 - Determine whether they need your help to remove the barriers.
- Discuss potential solutions to the problem or improvement actions to take.
- Agree on a written action plan.
- Set a date and time for follow-up.
- Document each date and time that follow-up has occurred, and details of those conversations.



DOCUMENTATION FORM

The Documentation Form should be used by leaders to document the development discussion with the teammate. It does not need to be presented to the teammate, but it should be retained by the leader to reference in the Supervisor File. When completing the documentation form, use the following instructions:

Leader Discussion Points

List reasons to explain to the teammate so there is a clear understanding of why the development discussion is taking place. List specific behaviors, actions, and dates that have led to the discussion and be consistent with expectations.

Expectations and Improvement Plan

Solicit and document teammate's feedback and cooperation to create an improvement plan. Offer guidance by clearly stating the desired outcomes and expectations. Work with the teammate to determine reasonable timelines for improvement.

Teammate Response

Document the teammate's response to the discussion and include any suggestions the teammate has for improvement.

Coaching Follow-up Email

The Follow-Up Email template can be used to communicate the concerns, expectations, and solutions discussed during the coaching discussion.

The Documentation Form should be completed and retained for your records and reference but should not be presented to the teammate.





Development Discussion Documentation Form

TEAMMATE INFORMATION	
NAME:	POSITION:
DATE:	LEADER:
LEADER DISCUSSION POINTS	
List specific behaviors, actions, and dates that have led to the development discussion:	
EXPECTATION AND IMPROVEMENT PLAN	
Solicit and document teammate's feedback and cooperation to create an improvement plan and determine reasonable timelines for improvement:	
TEAMMATE RESPONSE	
Document the teammate's response to the discussion:	