

## Situation Appraisal

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1 Identify Concerns	
What is a concern?	When to use Situation Appraisal?
<p>A feeling that you need to do something...</p> <p>Fix a problem                      Make sure an action or plan works</p> <p>Make a choice                      Understand unclear issues</p> <p>A concern can be a single issue or a group of issues</p> <p>Different types of concerns require different approaches</p>	<p>Are any of the concerns facing us unclear?</p> <p>Is the number of concerns facing us overwhelming?</p> <p>Are we unclear in which order to address the concerns?</p> <p>Are we unclear about how to resolve the concerns?</p> <p>Yes to any of the above = use Situation Appraisal</p>
Identify the theme	
<p>What are the primary areas of concern?</p> <p>What boundaries will help focus our attention and resources?</p> <p>What is the theme for this Situation Appraisal?</p>	
List concerns	
<p>What deviations are occurring?</p> <p>What decisions need to be made?</p> <p>What plans should be implemented?</p>	<p>What changes are anticipated?</p> <p>What threats exist?</p> <p>What opportunities exist? What else?</p>
Separate and clarify concerns	
<p><b>Separate</b></p> <p>Is there more than one issue in this concern?</p> <p>What's the evidence?</p> <p>What else concerns us about...?</p> <p>Can this concern be resolved by a single analysis or action?</p> <p>What's the evidence?</p>	<p><b>Clarify</b></p> <p>What exactly do we mean by...?</p> <p>What exactly is...?</p>
Create action statements	
<p>Does each separated and clarified concern indicate the action needed to resolve it?</p> <p>Is the action about a deviation, a choice, a threat, or an opportunity?</p> <p>Do we simply need to get something done?</p>	<p>If the action is not clear, rewrite the concern as a...</p> <p>Problem Statement (object and deviation)</p> <p>Decision Statement (choice word, result, and modifiers)</p> <p>Potential Problem Statement (action or plan that needs protecting and end result)</p> <p>Potential Opportunity Statement (action or plan that needs leveraging and end result)</p> <p>Situation Theme Statement (a separate category of concerns that need appraising)</p> <p>If the action required is still unclear, separate and clarify further</p>
2 Set Priority	
Use knowledge and experience	OR Use current impact, future impact, and time frame
<p>Which concerns should we work on first?</p> <p>If clear, or if immediate action is needed, set the priority order:</p> <p>Examine the list of action statements</p> <p>Identify those to address immediately and those to delay</p> <p>Mark the highest priority concerns with asterisks (*)</p> <p>If unclear, or if you cannot agree on priority order, use current impact, future impact, and time frame</p>	<p>Current impact = actual impact up until this moment on people, safety, cost, customers, productivity, reputation, etc.</p> <p>Future impact = anticipated impact from this moment forward, if left unresolved, on people, safety, cost, customers, productivity, reputation, etc.</p> <p>Time frame = deadline (clock and calendar time) after which resolution will become difficult, expensive, impossible, or meaningless to resolve</p> <p>What is the current impact of this concern not being resolved?</p> <p>What will be the future impact if this is left unresolved?</p> <p>What is the time frame (specific time or date) when this will become difficult, expensive, impossible, or meaningless to resolve?</p> <p>Confirm and record specific, supporting data for current impact, future impact, and time frame</p>
3 Plan Next Steps	
Determine resolution approach	
<p>What steps or actions are required to resolve this concern?</p> <p>Is the action about a deviation, a choice, a threat, an opportunity, or something that just needs to be done?</p> <p>What analytic process (and how much) is required for resolution?</p> <p>What follow-on steps or actions are needed? What else?</p> <p>Record the process and other actions needed for resolution</p>	<p>PA = Deviation? Cause unknown? Need to know cause?</p> <p>DA = Choice?</p> <p>PPA = Action or plan to protect?</p> <p>POA = Action or plan to enhance?</p> <p>SA = Further clarification?</p> <p>No analysis = Just do it!</p>
4 Plan Involvement	
Determine help needed	
<p>Who needs to do what and by when?</p> <p>Who needs to be involved for:</p> <div><div><ul style="list-style-type: none"><li>• Superior solution?</li><li>• Approval?</li><li>• Development?</li></ul></div><div><ul style="list-style-type: none"><li>• Commitment?</li><li>• Creativity?</li><li>• Structure?</li></ul></div><div><ul style="list-style-type: none"><li>• Support?</li><li>• Implementation?</li><li>• Information?</li></ul></div><div><ul style="list-style-type: none"><li>• Analysis?</li><li>• Consensus?</li><li>• Goal agreement?</li></ul></div></div>	