

Performance Renewal Assessment

FORM 1 OF 4

Steward:

Date:

Work Universe / Constellation:

EVIDENCE BASE

What does the evidence tell us?

What is the condition that now requires Renewal?

What remains uncertain?

PRIMARY RENEWAL DOMAIN

☐ Individual

☐ Constellation

☐ Work Universe

☐ Organization

☐ Steward

Why does the evidence point primarily to this domain?

Performance Renewal Assessment

FORM 1 OF 4 - CONTINUED

PRIMARY RENEWAL INTENTION

- ☐ Restore - rebuild what has diminished
- ☐ Reset - change what no longer serves
- ☐ Strengthen - invest more deliberately in what is working

THREE RENEWAL QUESTIONS

These are judgment questions, not sequential steps.

Restore — What valuable thing has diminished?

Reset — What no longer serves this Work Universe?

Strengthen — What is working well enough to deserve greater investment?

What specifically are we trying to Restore, Reset, or Strengthen?

What evidence supports this intention?

What is the first deliberate action supported by the evidence?

When or by what event should this judgment be reassessed?

Renewal Action Plan

FORM 2 OF 4

Steward:

Date:

Work Universe / Constellation:

RENEWAL JUDGMENT

Primary Domain

☐

Individual

☐

Constellation

☐

Work Universe

☐

Organization

☐

Steward

Primary Intention

☐

Restore

☐

Reset

☐

Strengthen

What specifically are you trying to Restore, Reset, or Strengthen?

Why does this matter now?

If the Renewal succeeds, what will be different?

What should remain unchanged?

Renewal Action Plan

DELIBERATE ACTIONS

ACTION 1

Action

Owner:

Timing:

Evidence of progress

ACTION 2

Action

Owner:

Timing:

Evidence of progress

Renewal Action Plan

DELIBERATE ACTIONS

ACTION 3

Action

Owner:

Timing:

Evidence of progress

ACTION 4

Action

Owner:

Timing:

Evidence of progress

Renewal Action Plan

SUPPORT, DECISION RIGHTS & REASSESSMENT

What capability or support is required?

Which Decision Rights are required, and who holds them?

What barriers or organizational constraints must be addressed?

What evidence would demonstrate meaningful progress?

What evidence would tell us to change course?

Reassessment date, event, milestone, or performance period

The Responsibility to Act

FORM 3 OF 4

Steward:

Date:

Work Universe / Constellation:

What current person, role, process, practice, structure, or arrangement may no longer be able to continue unchanged?

What evidence supports that conclusion?

What has changed since the last Renewal decision or reassessment?

What is the cost or risk of continued delay?

The Responsibility to Act

FAIR OPPORTUNITY

WHERE AN INDIVIDUAL OR EMPLOYMENT RELATIONSHIP IS INVOLVED

- ☐ Expectations were clear
- ☐ Performance or behavior concerns were communicated honestly
- ☐ The person had a genuine opportunity to understand what needed to change
- ☐ Appropriate support was provided when improvement was reasonably possible
- ☐ Enough time or experience was available to produce meaningful evidence
- ☐ The Steward distinguished a difficult beginning from a persistent condition

What support or opportunity has already been provided?

What, if anything, would still be fair and reasonable to provide before acting?

The Responsibility to Act

DECISION TEST

What alternatives have been seriously considered?

Why is the selected action more responsible than continued delay?

What consultation or organizational process is required before acting?

How will dignity be protected?

What will the Work Universe need afterward?

The Responsibility to Act

DECISION RECORD

The condition that requires a decision

Evidence supporting the decision

Action selected

Why this action is now more responsible than continued delay

How dignity will be protected

What the Work Universe will need afterward

The Renewal Capacity Review

FORM 4 OF 4

Steward:

Date:

Work Universe / Constellation:

EVIDENCE OF RENEWAL CAPACITY

	LIMITED	EMERGING	STRONG
People surface issues before they become serious	☐	☐	☐
People question practices that no longer serve the purpose	☐	☐	☐
People initiate useful improvement without waiting for formal direction	☐	☐	☐
Knowledge and evidence move across the Constellation	☐	☐	☐
Accountability exists among people rather than flowing only from the Steward	☐	☐	☐
Catalyst contribution helps surface opportunities and improvement	☐	☐	☐
Future Stewards are developing	☐	☐	☐

The Renewal Capacity Review

WHAT NEXT?

Where is Renewal Capacity strongest?

Where is the Constellation still overly dependent on the Steward?

What capability, information flow, or Decision Rights would strengthen participation?

What should the Steward do next without transferring accountability?