

TIP SHEET FOR MAKING ACCURATE OBSERVATIONS AND ASSESSMENTS

When observing leadership, the following three components ensure observations are accurate and descriptive:

1. Plan observation around key events.

Try to observe your subordinate leaders under all of the following conditions:

- See them challenged by a developmental need
- See them excel by applying a personal strength
- Observe their actions during critical times of unit performance
- See them reach their limits of strength and endurance
- Observe decision-making
- Observe their impact on subordinate leaders and Soldiers
- See them relaxed and available for conversation

2. Observe for a pattern of behavior.

3. Record Important observations without delay.

Record your observations and assessments using a SOAR card. SOAR provides a quick, accurate, and consistent way to take notes about a subordinate leader. It is also useful to use as a guide when providing the leader with feedback.

- **Situation:** Describe the situation/conditions of the assessment. When recording your observations, be sure to do so without delay to ensure that you capture all important information. Use words that depict action and that link effects and outcomes. Importantly, think about the constraints that the person was under during the task. For example, did something occur prior to the observation that may have affected their concentration? Is there a personal problem that may be distracting him or her?
- **Observation:** Describe behavior and impact on mission and/or Soldiers. You might consider recording the elapsed time and actions both taken and NOT taken. Record behaviors in chronological sequence, and do not allow mission accomplishment to influence recorded behaviors.
- **Associate & Assess:** Associate leader strengths and development needs observed with FM 6-22 competencies or attributes. Refer back to FM 6-22 to learn more about the Army Core Leader Competency Model. For quick reference, refer to FM 6-22, Appendix A: Leader Attributes and Core Leader Competencies.
- **Reinforce & Recommend:** Note appropriate feedback, praise, or correction. Recommend action to sustain/improve leader behavior. Ensure that you and the observed leader share an understanding of what occurred. Think about providing action-oriented advice on how to enhance a leader strength and/or improve upon a developmental need. These notes will help you plan feedback to discuss with the leader.

Format for using the SOAR method:

Situation: Describe the situation/conditions of the assessment.	
Observation: Describe behavior and impact on mission and/or Soldiers.	Associate & Assess: Identify FM 6-22 competency; assess proficiency.
Reinforce & Recommend: Note appropriate feedback, praise, or correction. Recommended action to sustain/improve leader behavior.	

Note: The SOAR card is not a score sheet for you're a subordinate leader's performance, nor is it a report you hand over to them. Rather, SOAR is a method to help you record leadership observations and plan a leadership feedback discussion with the subordinate leader.