## Performance Discussion Worksheet

## Pre-Meeting Checklist

***For Management/HR Only***

**Employee:** Full Name, Title **Date:**

**Supervisor:** Full Name, Title

**Type of Problem:** 🞎 Attendance 🞏 Work Performance 🞏 Behavior / Conduct

**Basic Issue/Overall Concern:** Examples: failure to follow time/work schedule; unauthorized/unexcused absence; tardiness/lateness; insubordination, etc.

**Actual Performance:** ADD THOROUGH/DETAILED TEXT

**Desired Performance:** ADD THOROUGH/DETAILED TEXT

**Dates of previous discussion about problem(s):**

* ***For Example***: DATE: Performance Improvement Discussion (PID) for not following call-in procedures and No Call/No Show.
* ADD OTHER RELATED ISSUES HERE (INCLUDING CONSTRUCTIVE CONTACTS)

**Impact and Benefits (The good business reasons why the problem must be solved and the benefits to the employee for doing so):** ADD THOROUGH/DETAILED TEXT

**Consequences (The logical consequences the individual will face if he/she fails to correct the situation):**

**The Five Classic Questions:**

⌧ Did the employee clearly understand the rule or policy that was violated?

⌧ Did the employee know in advance that such conduct would be subject to disciplinary action?

⌧ Was the rule violated reasonably related to the safe, efficient and orderly operation of the business?

⌧ Is there substantial evidence that the employee actually did violate the rule?

⌧ Is the action planned reasonably related to the seriousness of the offense, the employee’s record with the organization, and to the action taken with other employees who have committed a similar offense?

**Action: (This discussion is intended to be):**

🞏 Performance Improvement Discussion 🞏 Work Performance Reminder

🞏 Written Reminder 🞏 Decision Making Leave

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