

DEPARTMENT LETTERHEAD

[DATE]

[EE FIRST NAME] [EE'S LAST NAME]
[EE TITLE]

Subject: Counseling memo for [REASON]

Dear [EE Name]:

INTRODUCTION: Identify the action being taken (Specific: State the problem)

- This counseling memo is a follow up to our conversation on [DATE] regarding [STATE THE REASON].
- This counseling memo is documenting the recent issues regarding your [STATE THE REASON].

WHAT HAPPENED: Who, What, When Where (What was done? / How it was done/Prove It!)

- Your regular work schedule is from Monday to Friday from [TIME] to [TIME]. On [DATE] you arrived to work at...
- On [DATE], I discussed with you the expectation that you work your entire scheduled shift. On [DATE], you arrived at [TIME] for a [TIME] starting time, and were observed leaving your job site at [TIME]. As we discussed, you are expected to work your scheduled shift, this means arriving on time and leaving your job site on time.
- You are scheduled to work Mondays through Fridays from [TIME] to [TIME]. In this calendar year you have called in sick [NUMBER OF TIMES] and of those times, [NUMBER] times were on either Mondays, Fridays, or immediately preceding or following holidays.

ESSENTIAL FUNCTIONS (POSITION DESCRIPTION): Pull language from the PD to illustrate appropriate functions/duties (as appropriate – work with HR on this!)

IMPACT: Describe the adverse impact (So What!)

- Your late arrivals are negatively affecting the units operations, as well as the morale of the team. As a [EE's Title], we rely upon you to provide a high quality of customer service to our students and customers. When you fail to show up to work, other staff members must be pulled away from their work to cover your responsibilities until you arrive, on top of managing their own areas of responsibility.
- It is an essential part of your job to arrive to work on time and ready to work. Your repeated late arrivals are negatively affecting the unit's productivity and overall morale. This is unacceptable.
- Your behavior/conduct/actions on [DATE] were unacceptable and will not be tolerated. Your conduct negatively impacts the work environment and erodes the professional standards and morale of the [UNIT].

REFER TO HISTORY: Refer to history, of coaching, training, handbooks, and other counseling memo's.

- Any overtime should not be worked unless decided and approved in advanced by your supervisor, as stated in the [DEPARTMENTAL PROCEDURES/COLLECTIVE BARGAINING AGREEMENT ARTICLE] that state: “XXX”
- On [DATE] you attended a training that covered.....
- On [DATE] I discussed the importance of [TOPIC] and provided you with [DOCUMENTATION] materials...

STATEMENT OF FUTURE EXPECTATIONS: State/Clarify the expectations for future performance/conduct (Measurable: When is it going to be accomplished is it reasonable, Time-Bound)

- You are expected to immediately adhere to the [PRINCIPLES OF COMMUNITY/DEPARTMENTAL PROCEDURES/COLLECTIVE BARGAINING AGREEMENT ARTICLE]. Additionally, you will be required to attend various trainings as directed by your supervisor.
- To help with your growth in this area of communication I am requiring that you attend the [TRAINING] workshop, on [DATE].
- Effective immediately I am requiring you to check in with me at beginning of your shift at [TIME] in my office and again at the end of each workday at [TIME] in my office. If you cannot physically locate me, then you are expected to use the [SPECIFIC PHONE] to call me and leave a voicemail on my office phone. I will re-evaluate your attendance in three (3) months.

CLOSING STATEMENT

Sometimes personal issues may affect one’s ability to perform their job. You may wish to contact the [INSERT EAP INFORMATION HERE]

You are also encouraged to explore whether your absences might be covered under the Family and Medical Leave Act (FMLA). If you would like to discuss medical leave options, you may reach out to [INSERT BENEFITS CONTACT(S) HERE].

I am here to support you in your efforts to improve your [STATE PROBLEM OR ISSUE]. If at any time I can be of assistance to you or if you have any questions regarding these expectations please do not hesitate to speak with me.

Sincerely,

[NAME]
[Supervisor Title and Unit]

Enclosures:

Copy: Director/Senior Superintendent/Associate Director
Human Resources