



## Performance Improvement Expectations Memorandum

**Purpose:** The purpose of this documentation is to bring your attention to deficiencies in performance and/or conduct. The intent is to define for you the seriousness of the infraction(s) so you may take immediate corrective action. This documentation will be placed in your personnel file.

<b>Employee Name:</b>	<b>Employee Title:</b>
<b>Supervisor's Name:</b>	<b>Supervisor Title:</b>
<b>Department:</b>	<b>Date:</b>

**(I) Action:** (Note: progressive discipline is not guaranteed.)

- Verbal Warning       Written Warning       Performance Improvement Plan       Final Warning

**(II) Summary of Performance Concerns**

**(A) History of Relevant Past Performance Issues (if applicable)**

- (1) Background information on previous, similar performance discussions
- (2) Description of prior disciplinary actions taken or previous performance improvement plans or documented coaching issued

**(B) Description of Current Areas of Concern**

- (1) List all issues separately and clearly
- (2) Describe general, common themes among the specific performance issues (i.e. lack of judgment, lost confidence of leadership in performance, absenteeism or tardiness, lack of skills, failure to follow instructions, inability or unwillingness to modify behaviors, poor attitude, lack of effort, lack of productivity, etc...)

**(III) Corrective Action Expectations, Success Criteria and Expected Reporting:** (Document the necessary steps to correct the problem and clear expectations for satisfactory improvement. Include timeframes for review and follow-up sessions as needed.)

**(A)** (List the specific issue and the success criteria/expectations (how supervisor and employee will both know if the employee has achieved an acceptable level of performance/correction))

**(B)** (List specific time frames for expected improvement (describe the period of time over which improvement is expected-no less than 30 days is recommended; generally a timeframe from 60-90 days would be standard and appropriate; in some situations, the behavior or performance will never be accepted and the corrective action expectations will be "ongoing"))

**(C)** (Describe any status reports/updates or check-ins that will be required as follow up to determine progress being made (describe what the employee will be expected to do to report progress being made or follow up meetings the manager anticipates scheduling to check on progress-it is critical that there be ongoing discussion throughout the period, as opposed to a single discussion at the beginning of the improvement period and a single discussion at the end of the improvement period))

**(D)** Please understand that you are ultimately responsible for improving your performance to an acceptable level and sustaining that performance level. Your supervisor is willing and able to help you. Additionally, you are encouraged to use the following tools as resources for the growth and redevelopment anticipated by this memorandum: (list all resources that are specific to the situation, such as additional training; coaching; reviews; software, etc...)

**(IV) General Expectations and Performance Guidelines**



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It is critical that you address the issues and concerns described in this memorandum in a spirit of responsibility, understanding, cooperation, and positive improvement. No matter what improvements are made in the substantive areas discussed in this memorandum, it will not be acceptable to demonstrate any form of negativity or resentment toward this process or your responsibilities.

Please understand that the issues covered in this memorandum are not the only performance expectations for your position. You are expected to perform satisfactorily in all areas. This memorandum is intended to focus on those areas where immediate and sustained improvement must occur, but not the exclusion of your other job duties.

It is your responsibility to demonstrate that you can meet and sustain these performance objectives within the time period described in section III(B) and to maintain those performance objectives thereafter. Although the time period described in this memorandum is for a certain period of time, it is important for you to understand the performance period is not to be understood as a “grace period” or as a contract of employment for a defined period of time. It is neither. You remain an employee at-will and if, at any time during the duration of this memorandum, you do not demonstrate the attitude and behaviors toward improvement that we expect, immediate action may be taken, which includes immediately terminating your employment. Likewise, successfully fulfilling the expectations described in this memorandum does not excuse future nonconformance nor does it guarantee continued employment. Any recurrence of the above-described issues or other performance issues in the future may result in immediate termination of employment or other disciplinary action. Our hope is that this will not be necessary, but we want to ensure mutual understanding and to encourage your best efforts in achieving and maintaining the performance standards expected of you.

### (V) Employee Agreement to Comply with Established Expectations

Please sign where indicated below acknowledging that you: (A) have read this agreement; (B) fully understand this agreement and the expectations established; and (C) are committed to making the improvements described in this agreement.

A copy of the document and any applicable policy or guideline will be shared with you. If you would like to add your response to this document, you may send it to your supervisor and Human Resources so it can be included in your personnel file as part of the record.

Employee Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Supervisor Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Human Resources Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Employee refused to sign.



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### (VI) Resignation Option

If, after fully considering this Performance Improvement Expectations Agreement, you do not believe you will be successful in accomplishing the required improvement, or you do not wish to make the commitment necessary to do so, as outlined in this memorandum, you may decide to resign your employment rather than agree to the expectations described above. We are not encouraging or inviting you to take this option, but we recognize that you may not wish to avail yourself of this Performance Improvement Expectations Agreement. If that is the case, please print your name and sign below, indicating your desire to immediately resign your employment:

I, \_\_\_\_\_ [print name], having considered the content of this Performance Expectations Agreement, do not wish to continue my employment. By signing below, I submit my resignation from employment, effective immediately.

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Supervisor Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
HR Representative Signature

\_\_\_\_\_  
Date