Sample Counseling Memorandum – **Performance
Instructions are in boldface type**

MEMORANDUM

Date: April 1, 2015

From: Mary Jane Supervisor **Sign or initial here**

To: Wanda Doe Employee

Subject: Documented Counseling

**1. Describe the behavior. Cite specific examples. Keep in mind that your objective is to lay out a clear and factual foundation of all information that led to your decision to take this action.**

The purpose of this memorandum is to advise you of concerns regarding your performance and to set forth expectations regarding necessary improvement. My intention is to give you a fair opportunity to correct the problems that have been observed, so that disciplinary action will not be necessary.

On 3/2/15 I emailed you asking for copies of the financial records for the Betty Johnson Scholarship fund. The copies were needed for a meeting with the vice president of the department on 3/25/15. You did not respond to my email, and on 3/9/15 I asked you again except this time in-person to provide me with the copies of these documents.  You apologized for not responding to my email and said you were busy trying to coordinate the Scholarship Expo and asked me if it would be alright to give the copies on Monday,  3/16/15. I told you yes and re-emphasized to give me the copies on Monday and no later.  As of today 4/1/15, I still have not received copies of the documents I requested from you.

**2. Clarify your expectations. You may want to use specific examples in order to ensure that the employee understands. State what correction you want made and when. For most types of behavior or performance problems, you will want correction “on an immediate and sustained basis.”**

In the future you are to provide any documents or complete job task(s) in a timely manner of their requested due date. I expect to see improvement in your performance on an immediate and sustained basis. I want you take the 4/10/15 Time Management workshop offered here at the university to help you with tips and strategies on how to prioritize your work assignments. I will follow up with you on 4/14/15 to see if you have attended the workshop.

**3. State the probable action to be taken if the offense is repeated or deficiency persists.**

I am optimistic that you will use this memorandum to improve, and further action will not be necessary. Failure to meet my expectations may result in disciplinary action up to and including termination.

**4. Offer the employee an opportunity to sign the memo. If the employee refuses/declines to sign during the meeting, write “employee refused to sign” on the signature line, initial and date. The employee gets the original, you keep a copy.**

I acknowledge that the above document has been discussed with me and I have received a copy of this same document.

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Employee’s Signature Date