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

MEMORANDUM

Date: April 1, 2015

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

To: Wanda 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 recent behavior 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 Tuesday, March 31, 2015, a complaint was received stating that you made disparaging remarks toward your supervisor in the presence of other employees and a customer. Specifically, on that date, you were speaking with a co-worker in the presence of another co-worker, who was waiting on a student at the service window. That co-worker heard you complaining about your supervisor. The co-worker then left the counter and room. She returned a few minutes later, and you were still complaining about your supervisor. Your behavior was disruptive to the work environment.

**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.”**

Future conduct of this type by you will not be tolerated. I expect to see improvement in your behavior on an immediate and sustained basis. You are to refrain from talking contemptuously toward others and about others, especially co-workers and your supervisor. Any conflict must be resolved professionally and tactfully, and in a manner that does not intimidate co-workers or disrupt the work environment. Most importantly, you are expected to be courteous and respectful in dealing with your co-workers and supervisor. It is your responsibility to ensure that your conduct remains appropriate at all times. You failed to do so during this occurrence.

**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.

**5. 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