

SAMPLE E-Mail String Documenting Employee Assignment
SAMPLE Counseling Memo Using the E-mail Documentation

Document, Document, Document

Keeping Track of it all

All Supervisors have heard it, but it does not have to be the bane of their existence. For example, all of these instances in which Supervisor Self discussed the upcoming Division Meeting with Randy help show that there was on-going dialog about Randy's assignment for the Division meeting.

This simple documentation not only helps a supervisor keep track of interactions with Randy, but

SCENARIO: Randy, a good employee is scheduled to make a presentation in an upcoming meeting that will be attended by all Division Staff. This is the first time Randy has been responsible for a portion of the agenda at a Division-wide meeting. Randy's Supervisor has been noting the times they have discussed the presentation by sending himself e-mails.

TO: Self

FROM: Self

DATE: August 3, 2012

Saw Randy in the hall and reminded him of his role in the upcoming meeting with Division staff. He said he was doing fine with the assignment and didn't need help.

TO: Self

FROM: Self

DATE: August 6, 2012

Discussed meeting presentation with Randy. He indicated he was almost finished with the product and didn't feel he needed a dry run on his presentation.

TO: Self

FROM: Self

DATE: August 10, 2012

Spoke with Randy and answered his questions about

the purpose of the division staff meeting

TO: Self
FROM: Self
DATE: August 11, 2012

Confirmed with Randy that he has everything he needs to effectively participate in the Division Meeting.

TO: Self
FROM: Self
DATE: August 12, 2012

Reminded Randy that I would meet him at 9:30 so we can go to Division Meeting together.

TO: Self
FROM: Self
DATE: August 13, 2012
Schedule meeting with Randy re:
 Late arrival on date of Division Meeting
 Incomplete and disorganized presentation
 Poorly researched presentation.

Document performance in counseling memo

SAMPLE COUNSELING MEMO USING E-MAIL DOCUMENTATION - Randy

This letter/memo documents the discussion supervisor had with Randy after the poor performance at the Division meeting. Addressing performance problems early will increase the success rate in getting employee performance turned around. If the problem does not recur, great; if it does, you have laid the foundation for further action should that become necessary.

August 16, 2012

TO: Randy

FROM: Supervisor

This memo confirms the discussions of our meeting today.

You were scheduled to make a presentation on very important state work to Division staff on August 13, 2012. We met five times in May, June and July and met in the hallway six times in August to discuss various aspects of your presentation and the meeting itself. During all of our interactions regarding this meeting, you assured me that you had everything you needed and would be ready for the presentation on August 13, 2012.

Not only did you arrive at 9:30 a.m. for a 9:00 meeting, your presentation was incomplete making it difficult for even experienced staff to understand. There were several times where I had to provide information to the group or explain concepts that should logically be included in the information. The disorganization of your power point presentation showed a lack of preparation.

While this was your first opportunity to develop and present technical information to all division staff your presentation was unacceptable and lacked the level of staff work I expect from an employee with your time and tenure in your classification. My expectation is that your work will always be accurate, timely, well researched and presented. If you become aware there are obstacles to your success, you are to keep me informed of your approach to overcoming them.

While you typically arrive to work by your start time, arriving a half-hour late without informing me that you were going to be late is unacceptable. As a result, the order of the agenda had to be changed, which caused help desk staff to come in earlier than expected to change out the equipment used for presentation. This disruption caused idle time for staff while help desk staff completed the changes. When we talked after the meeting, you indicated you were late due to "traffic and nerves." Reliable attendance is always important, but it rises to a higher level when the time of others is at stake. You will be responsible for getting and will be held accountable for the information from the portion of the meeting you missed.

If you have any questions, please do not hesitate to contact me.