



Policies

Performance Improvement Meeting Record

This meeting record should be used to document the discussion during a formal performance review meeting. Please ensure that you have read the Performance Improvement Policy prior to conducting the meeting.

Please ensure that all questions asked are captured and the responses from the employee are recorded clearly. Ask as many questions as necessary to ensure you have all information available to you along with any supporting evidence. A suggested script has been provided to guide you through the meeting. Any text in red is for you to amend as appropriate.

Names Present:

Employee Name and Job Title:	
Employee Representative Name and Job Title:	
Hearing Manager Name and Job Title:	
Note Taker Name and Job Title:	
Meeting commenced:	
Meeting ends:	

Open Meeting:

*Please put an x in the box to confirm the employee has been advised of the following. A suggested script has been provided above each action point in *Italic* to guide you through the meeting:*

(I am chairing the stage 1/2/3 formal review meeting and NAME is present as HR Representative and note taker)

Those present at the meeting are introduced and their roles in the meeting are confirmed

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(As advised in your invite to the formal review, you have the right to be accompanied by a workplace colleague or Trade Union or Preschool Learning Alliance Representative).

(You have exercised your right to be accompanied by a workplace colleague, Trade Union or Preschool

*Learning Alliance Representative and have brought **NAME** as your companion. **NAME** can support you, confer and take notes but is unable to answer for you)*

The employee has exercised their right to be accompanied by a representative and the representative is advised that they can ask questions, support and take notes but not answer on behalf of the employee

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(You have chosen not to be accompanied by a workplace colleague, Trade Union or Preschool Learning Alliance Representative; are you happy to proceed without?)

The employee has chosen to be unaccompanied and is happy to continue without representation

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*(This is a stage **1/2/3** formal review meeting to discuss your performance in the role of **ROLE** specifically since the **informal counseling stage/stage1/2** of the Performance Improvement Policy)*

Employee is advised that they have been brought into a formal review meeting in relation to their performance in their role

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*(The information we discuss today will enable us to make a decision on any further action that may be appropriate. The decision could be taken to issue a **further** formal sanction **up to and including dismissal** as outlined in the Performance Improvement Policy)*

Employee is advised that any information discussed in the meeting will enable a decision to be made on any further action that may be appropriate

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Structure of Formal Review:

Please put an x in the box to confirm the employee has been advised of the following. A suggested script has been provided above each action point in Italic to guide you through the meeting:

*(We will discuss your performance in your role since the **informal counseling stage/last formal review** and gather your thoughts and reasons)*

Employee is advised that their performance will be discussed

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(You will have the opportunity to put forward any representations/comments you wish us to consider)

Employee is advised that they will have the opportunity to put forward any representation/ comments that they wish to be considered

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*(The meeting will then be adjourned for myself and **NAME** to consider all the information put forward at the meeting and to come to a decision re next steps)*

Employee is informed that the meeting will then be adjourned to allow the opportunity to consider all of the information and evidence and to reach a decision on the outcome

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(The meeting will then be reconvened to deliver our decision regarding next steps)

Employee is advised that the meeting will then be reconvened and the outcome and any potential next steps will be discussed

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Record of Performance Improvement Meeting:

Please can you talk through examples of where you feel you have demonstrated improvement against the areas outlined in your performance improvement plan?

Record of discussion:

- Advise the employee of where you have seen improvements made

Record of discussion:

- Advise the employee of where their performance continues to be below expectations ensuring that any support, training etc that has been provided is discussed

Record of discussion:

- Confirm what level of performance is expected

Record of discussion:

- Summarise what improvements are required for the employee to achieve an acceptable level of performance

Record of discussion:

Are there any mitigating circumstances or underlying reasons as to why your performance is below expectations?

Record of discussion:

Is there anything you would like to add before we adjourn?

Record of discussion:

Meeting adjourned:

Meeting reconvened:

Outcome:

Please put an x in the relevant box to confirm the outcome of the formal review:

No Action

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Verbal Warning or Letter of concern

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Written Warning

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Final Written Warning

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Dismissal

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- Advise the employee of the outcome and the reasons for your decision:

Record of discussion:

- Advise the employee that they will receive the outcome in writing

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(If the employee has been issued with a sanction):

Employee is advised of the length of the sanction (*12 months*) and it is confirmed that they not be eligible for a salary review for the duration of the warning.

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(If the employee has been issued with a sanction or been dismissed):

Employee is advised that they have the right to appeal within 7 days of receiving the decision in writing.

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- Discuss any next steps with the employee e.g. timescales, support to be provided, training, future expectations etc:

Record of discussion:

Once you have fully completed the meeting record, please email the form to the employee (if the employee has remained in employment) in order that the employee can confirm by return email that the details in the form are correct and that the content provides an accurate reflection of the discussion. Please then place on the employees personnel file.