



Performance Discussion Documentation

LAY PERSONNEL

Employee Name:

Location:

Employees Position:

Discussion Date:

Supervisor Who Completes This Form:

This form is intended to guide a supervisor through documenting and delivering an employee performance discussion. Conduct issues should be documented following The Diocese's Counseling and Corrective Action Policy. Coaching for Performance Discussion Documentation *should not be shown, allowed to review, or given to the employee for discussion, signature or details. Do not retain in personnel file, retain in supervisor file for 1 year.*

Describe the Incident:

Describe the behavior that was observed and state the facts specifically as possible without judgment, perceptions, opinions, exaggeration, labeling, or motives.

Express the Impact:

Describe how the behavior impacts the team and organization.

Specify the Behavior Change:

Describe the future or continued behavior that you want the employee to demonstrate going forward.

Communicate the Consequences:

Explain could lead to further corrective action or termination.

ACTION ITEMS: Identify action items for improving behavior. Discuss with employee when you will follow up and what you expect to find when you follow up.