

(Note: It is essential that the PIP take into account the employee's specific job requirements, performance deficiencies and training needs, as well as the department's specific expectations. ADD, DELETE, AND REVISE as much information in both the General Instructions and the Specific Improvement Expectation sections as needed. If any of the categories listed were not rated below for the employee, then remove them. For example: if the employee was a "meet standard" under problem solving then remove references to problem solving. This template is a sample from which to start. **Please adapt it to the employee's specific situation.**)

PERFORMANCE IMPROVEMENT PLAN

Date:

To: Employee's Name, Title

FROM: Supervisor's Name, Title

RE: Performance Improvement Plan

As reviewed with you in our discussion of your performance evaluation on (date), your performance as a (classification title) has been below standards. In order to provide you with clear information regarding performance standards and expectations, the following Performance Improvement Plan has been developed.

It is essential that you read, understand, and comply with all elements of this Performance Improvement Plan. You are to keep this Performance Improvement Plan in a convenient place where you can readily refer to it whenever you have questions. **Your performance will be reviewed again in approximately 60 days.**

GENERAL INSTRUCTIONS

1. You will receive assignments from (name, title). You are to listen carefully and take comprehensive notes whenever you are receiving assignments. Your notes should include all relevant details, including but not limited to the assigned task(s), any particulars regarding methodology, and the assignment due date.
2. You are to take responsibility for fully understanding all tasks that are assigned to you. If you are given any tasks that you do not understand, you are to obtain clarification immediately, that same day. If you need to reach me and I am not in the office, you are to (specify back-up plan, such as contacting the lead staff member and/or contacting the supervisor by cell phone). Failure to obtain clarification or saying that your supervisor was not available will not be an acceptable excuse for not completing the task correctly, and in a timely manner.
3. If you are unclear as to whether or not you have been assigned responsibility for a particular task, you are to immediately clarify this information with me. Failure to obtain clarification, and/or contending that you were not sure the task was assigned to you will not be acceptable excuses for failure to complete the task.
4. You are to produce a brief (specify whether it should be weekly or bi-weekly) report that includes progress to date on all of your assigned tasks. The format for this report will be given to you. You are to bring this report to our meetings on (day) at (time). In the event that our meeting is

cancelled or rescheduled, you are to turn this report in by (same day and time as scheduled mtg), unless directed otherwise. If you are out ill on the day this is due, you are to turn it in by (time am/pm) the day you return to work.

5. Most, if not all, tasks will have assigned deadlines. You are expected to manage your work in such a way as to meet all assigned deadlines. If there is a reason that you will be unable to meet a particular deadline, you are to discuss this with me in advance, so that if necessary, your work may be reprioritized.
6. You are to keep me informed of all pertinent developments in your work, including any items of possible consequence, such as customer service or politically sensitive issues. When working on high priority items, you are to keep me regularly informed regarding your progress until the item has been thoroughly completed.
7. You are to always conduct yourself in a way that reflects positively upon the (name of department), our department management and upon your supervisor and lead staff. You are to courteously, carefully, and completely respond to and follow all supervisory instructions.
8. You will take responsibility for the entire process for each assigned task from the time it is assigned to you until it is totally completed, including taking steps to ensure that it is completed when it is on someone else's desk. If you meet up with difficulties in this regard, you are first to make a good faith attempt to solve them, and then, if that doesn't work, you are to notify me in a timely manner.

SPECIFIC IMPROVEMENT EXPECTATIONS

(As much as possible set expectations that can be measured, i.e. give specific timelines, specific tasks or include specific established metrics)

1. **Quantity:** You will meet assigned deadlines for all tasks, including (name of task(s)). As stated above, if there is a reason that you will be unable to meet a particular deadline, you are to discuss this with me in advance, so that if necessary, your work may be reprioritized.
2. **Quality:** You are to complete all assignments thoroughly. Your written work should be clear, complete, accurate, and correctly proofread the first time you turn it in. You are to provide services perceived by your customers as high quality, courteous, timely, and responsive. You are to listen attentively to customer needs and to take careful notes. You are to project yourself as 100% willing to serve our customers, and as willing to take on and accomplish whatever tasks are necessary in order to provide excellent customer service. You are to generate suggestions and means for solving problems that are above and beyond what our customers can think of on their own.
3. **Problem Solving:** You are to identify problems at the earliest stages, when they can most readily be solved. You are to take responsibility for solving problems, while working within accepted human resources practices. You are to keep your supervisor informed regarding any problems you are working on. You are to notify your supervisor in advance of any problems that may come to her attention or to the attention of department management.
4. **Communications:** You are to listen to others--your supervisor, (name of dept.) Management, customers, and co-workers—carefully and attentively, taking accurate notes. You are to conduct yourself professionally and courteously at all times. You are to independently follow up on all assigned tasks, even when updates have not been requested by the customer or your supervisor.

5. **Initiative:** You are to demonstrate an active, rather than a passive, approach to your work. You are to take complete responsibility for all tasks that have been assigned to you. You are to take action to move tasks forward, even if they are on someone else's desk at the moment. You are not to use the fact that you are waiting for something (information, etc.) as an excuse for not completing work in a timely manner. You are to volunteer for at least your share of team assignments.
6. **Adaptability:** The current work environment in (name of dept.) requires the ability to readily and successfully adapt on a continuing basis to changes in work assignment, approach, procedures, etc. You are to carefully think through your approach to work assignments, adapting it as needed for the type of assignment. When procedures or task requirements change, you are to successfully adapt to and comply with the new procedures and task requirements. You are to follow supervisory instructions regarding changes in procedures, tasks, etc.
7. **Planning and Organization:** You are to plan and organize your work in a way that allows you to complete priority tasks and meet assigned deadlines. (include specific details where applicable) You are to efficiently and effectively use your work time. You are to minimize interruptions that distract you from your work in general, and more specifically from your high priority tasks.
8. **Cooperation:** You are to comply with all supervisory directives and instructions. You are to establish cooperative work relationships with customers, co-workers, and management & supervisory staff. You are to complete your work in accordance with priorities as defined by your supervisor. (include specific details where applicable) You are to conduct yourself courteously and to exercise tact in all of your interpersonal exchanges. You are to be a team player, and to refrain from talking negatively about other staff to co-workers.
9. **Judgment:** You are to exercise sound and independent judgment in the completion of your assigned work tasks. You are to carefully gather all information and consider all aspects of a situation and then make judgment calls appropriate to your position. In cases where you do not feel comfortable making such a judgment call, you are to outline the advantages and disadvantages of various options and make a recommendation to your supervisor regarding the best course of action. You are to do this in a timely manner.
10. **Dependability:** You are to complete all work assigned to you in a timely manner, and by the assigned deadlines. You are to do so even when others are not asking for updates on that particular task.
11. **Attendance:** You are to comply with the instructions in your Medical Certification Directive Memo dated (date). You are to arrive to work on time. You are not to exceed your allotted time for breaks or lunch without previously obtaining supervisory approval. You are to attempt to schedule all personal appointments in a way that minimizes interference with your job.

TRAINING/FEEDBACK

1. **Regular Meetings:** In order to provide you with regular feedback regarding your performance, we will be meeting every (list day, and time, ex: every Tuesday at 2:00pm). (Note: Meetings should occur no less often than every two weeks.) We will discuss the status of your work assignments. I will answer any questions you may have and provide you with feedback.

2. **Open Door Policy:** If you have any questions regarding your assigned work, my door is always open. If I am not available in the office and you have an urgent need to contact me, you can call my cell phone at XXX-XXX-XXXX.

3. Training:

(Note: The department should consider both formal and informal training needs; the latter can be accomplished by reading manuals, observing someone else perform the function, attending a staff meeting, etc.)

(Use if the department wants the employee to take responsibility for finding appropriate training.)

You are to seek out, obtain approval for, and attend training programs acceptable to (dept.) Management in the following key areas of your work performance:

- (Specify areas in which formal training is needed, such as Written Communication & Proofreading or Effective Time Management, etc.)
- These training programs will be paid for by the (dept.). You are to obtain approval prior to registering.
- These training programs should be attended as soon as possible, and no later than (date).

(Use if the department wants to direct the employee to attend a particular training session.)

You are to attend the following training session:

- Name of training
- Location of training
- Time of training

(Use if you want the employee to review a particular manual.)

You are to review the following information located in:

- list dept policies, procedures, subject manuals or any specific documentation that would assist employee in improving his/her performance
- You will be expected to have any questions ready to discuss with me in our meeting on (date). You will be expected to have a clear and complete understanding of this material from that date forward.

If there are additional areas in which it appears that you need training, you will be provided this training on-the-job, either via observing another staff member performing a particular task, or via supervisory instruction in our regular meetings.

If you believe you need work-related training in a particular area in order to successfully perform your assigned job responsibilities, it is your responsibility to notify your supervisor of this need.

cc: Personnel File
(name), Human Resources Business Partner
Human Resources, Employee Relations Division

(Revised: Dec. 2, 2019)