



How to Document a Discussion

Process:

- Summarize what was said during the meeting
- Describe the expectations- clearly state what the policy/procedure requires
- Describe the behavior or performance that must change and that which should continue
 - Remember to describe the conduct, not the employee
- Include the employee's explanation why the expectations are not being met
- Include the detailed action plan which specific deadlines

Tips to Remember

- Set specific deadlines
- Avoid vague, unclear statements about what the employees needs to do to improve
- Avoid absolutes like "always," "never"
- Include positive comments
- Prepare the documentation as though a third party will read it

Example:

To: Employee
From: Manager
Date: 2/1/2021
Re: Follow up to 1:1

Dear (Employee Name),

This email is to document our conversation today, regarding (describe the performance/ behavior issue). During the meeting we spoke about _____. During our discussion you brought up that the reason for the issue was because _____.

As we discussed, the performance/behavior issue is not in line with list University/department policy/ management expectation here. It is the expectation that moving forward you will _____ by deadline date.

To assist you through this process, here are some resources/guidelines that you can utilize. I will schedule a follow up meeting for date to review progress on this issue. Please let me know if you are unclear about any of the expectations or if you feel I have left out any details from our conversation.

Thank you, Manager