

CLIENT COMPANY _____

PERFORMANCE ACTION PLAN EXAMPLE

Employee _____

Meeting _____

Date _____

Dept. _____ Supervisor _____

Areas Reviewed

Productivity Efficiency Teamwork Quality

Attendance Conduct Other

(define) _____

Specific areas under review:

Conduct:

_____ you have many fine attributes however, your conduct as of late has created a challenge for _____ in its transition to become more effective and efficient. You are exhibiting behaviors which portray a lack of teamwork and rebuttal to many items that have been suggested and/or required, thus helping to create an environment of non-trust and a general lack of team. You are making decisions that are contrary to established _____ policy. Specifically, on Monday, _____, it was brought to our attention through payroll that two (2) teachers, were hired at a step 11 and step 15 respectively. It has been the policy of _____ to cap new hires at the 8th step. When asked about this you stated that you knew that the policy was in effect however you believed it was difficult to attract people to these positions and you knowingly decided to offer them a salary well above the 8th step as the policy dictates. When first asked if the higher pay was in the budget you responded that it was. Upon further discussion, you contradicted yourself and stated that you would have to make some cuts in other places to offset the cost. What makes this more egregious is that you were already involved in reducing the budget due to costs being too high and you were well aware that the Board had accepted the budget without any consideration for higher pay for the two faculty members mentioned above. You stated to _____ and _____ that you would just go to the

board and convince them that they needed to allow this variance. This was a premeditated action and is a serious violation of _____ policy. If _____ were to lower either of the two (2) teachers to the 8th step, it could and probably would be construed to be a breach of contract and the school would be in litigation. You made this decision with the knowledge that there were not any budgeted funds to support it. This in itself is grounds for termination from employment.

In addition, you have been somewhat argumentative and presenting roadblocks to the direction that the Board has taken in relation to _____ responsibilities.

Example:

The Board adopted an organizational chart indicating that the Office Staff would be basically under the direction of _____, with _____ reporting to _____ and the rest of the Office Staff reporting to _____. You have still not accepted this and continue to go against the Board's directives.

The following are the Board's expectations for you:

1. You cannot make decisions which contradict established policy.
2. If you disagree with a policy or you believe you need some type of variance, you must seek the Board's approval before actually making the decision and implementing any action.
3. Become less argumentative when you are questioning a decision or directive given.
4. Display a positive and cooperative attitude in your dealings with _____.
5. Treat all people respectfully that you come in contact with.
6. Follow the Board's direction and requests without arguments or negative statements. If you question what you are asked to do, question in a respectful manner and carry on a dialogue in order to reach a solution. Be a part of the solution and not a part of the problem.

Suggestions:

1. Take time to understand the scope of your responsibilities and the responsibilities of _____.
2. Think before you speak. Try to think through what is being asked for before you respond emotionally.
3. If you have thoughts of a better way to do things, approach _____ or the Board in a positive manner and ask if you can discuss the matter.
4. If you are upset or feel that you are not being treated fairly or properly, talk with me.
5. Discuss your ideas and needs with _____ first and if you cannot resolve your concerns, speak with me.

Teamwork:

As a result of your behavior as described above, it also affects a sense of team in the School. Your negativity, in relation to _____ and dealings with _____ affects the morale and sense of team that is so needed to be positive especially during these difficult budgetary times. It is important that you exhibit a sense of team by supporting the mission of both schools with a positive approach. The Board has to feel confident that you will trust its judgment and decisions in relation to the needs of the school. If you do not agree with something please communicate and the

issue will be discussed.

Example: Telling _____ that she needs to watch out for _____ because they will eventually have you and her reporting to them.

Suggestions:

1. Discuss any areas of disagreement that you may have with the Board. We can resolve anything if we try however there are certain duties and expectations that you need to adhere to.
2. Try to be positive with staff and act as a role model. Do not be a part of starting any rumors.
3. The cup needs to be half full and not half empty.

_____, as I first stated you have many fine attributes however unless this period of negativity and challenging authority changes, your effectiveness becomes greatly diminished. We will work hard with you to help you resolve any problems that may be bothering you however you also have to do your part. You must understand that the decision you made without authorization to put the two (2) faculty members on a higher step level than authorized can be considered grounds for immediate termination from employment. We are not advocating termination at this time however if this type of behavior is not resolved it will lead to your dismissal. Please take this very seriously as we want you to be successful. To this end we are requesting the following Action Plan:

Action Plan:

1. You will immediately cease and desist from making decisions that are contrary to established policy.
2. You must present a positive attitude and be supportive of _____ efforts to support _____. You will strive to exhibit a positive attitude towards your work and colleagues.
3. You will be on a 60 probationary period. At any time during this period if you violate any _____ policies or undermine the operations in any manner, you will be immediately suspended pending final disposition according to _____ Rules and Regulations.
4. Think through any responses you may have about areas you may disagree with to aid you in not responding emotionally.

_____, We have faith that we can get past this and go forward. As I stated previously, we are willing to do anything to help you however you also must do your part. We will meet periodically to ensure that we are communicating and that all your questions will be answered

Your adherence to the above should be effective immediately. Failure to comply may result in disciplinary action up to and including termination from employment.

Agreed upon by: (Employee) _____ (Date) _____

(Supervisor) _____ (Date) _____

Periodic Review Notes

<u>Date</u>	<u>Employee</u>	<u>Supervisor</u>	<u>Comments</u>	<u>Initialed by:</u>
1.				
2.				
3.				
4.				
5.				
6.				

Reviewed and accepted by:

Employee Signature

Date _____

Supervisor Signature _____

Date _____