Follow the Paper Trail: Navigating Employee Documentation
First, Document this...
Objectives

Improve Employee Performance

Remove or Separate Unsatisfactory Employees
Importance of Documentation

Improves understanding and documents history
Provides clarity
Cumulative documentation reveals patterns
Assists memory
Improves decision making
Proves communication
Proves fair treatment
Obstacles to Documentation

Morale
Time
Lack of Skill
Fear of Retaliation
Timing of Documentation

Sooner rather than later
Whenever the employer wants to communicate clearly with the employee
When policies and/or procedures are not followed
When performance does not meet expectations
Anytime there is a problem of any kind
How to Document:

Communicate clearly

Rely on facts and observations

Do not use inflammatory language

Write in first person, be direct and to the point

Always use the full date of documentation including year, do not backdate if you document after the fact

Create the documentation close in time to the event
How to: cont.

Make directives (next steps) clear and precise
Treat all employees alike
Avoid writing when angry, write for the public
Avoid spelling and grammar errors
Welcome, Free WiFi, Continental Breakfast, Indoor Pool & Hot Tub, HBO, ESPN, CNN
I'm goin' to college.
Let's eat grandma!

Let's eat, grandma!

PUNCTUATION SAVES LIVES!

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MISSPELLING
It Still Matters. A Lot.

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WE ARE COMMITTED TO EXCELLENSE
To share or not to share...

Share with employee if

- It could impact their evaluation - mid or end of year
- It will be reported to next supervisor in chain of command
- Or is continual

Should be communicated within ten working days to employee
Then what?

Document receipt by the employee - What if they refuse to sign?

Give the employee an opportunity to respond in writing - can be on the documentation you have prepared or another piece of paper

Correct misunderstandings or misstatements

Refer the employee to specific policies, rules and regulations

Leave a record that other supervisors will understand
All the Pieces of the Puzzle...

Your documentation should contain:

- Facts
- Policies
- Directives/expectations
- Solutions/assistance
- Action
Activity
What type of document is right?

Memo to File: Minor problems, redirect, refresh memory, make your own system, usually not shared with employee

Specific Incident: Serious enough to require a conference, employee acknowledges receipt, invite employee response, may be reflected in evaluation

Summary Memoranda: Outline conferences regarding several incidents, employee acknowledges receipt, invite employee response, may be reflected in evaluation

Formal Evaluation: Be honest, provide accurate performance feedback
Delivery...

Emails

Conference/Meeting
The Power of Positive

Sometimes, the most powerful documentation you can write is ...POSITIVE!

High - Five: Pass it on
Now Document this...
Questions?

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