



ENGAGED HR IS YOUR HR DEPARTMENT.

[www.EngagedHR.com](http://www.EngagedHR.com)

## PREPARING FOR DISCIPLINE MEETING

EMPLOYEE/VOLUNTEER NAME:	START DATE:
JOB TITLE:	MEETING DATE:
SUPERVISOR NAME:	SUPERVISOR POSITION:

### Instructions:

Complete this worksheet prior to your meeting to gather and organize your thoughts and use this information to assist you in completing the documentation following the meeting.

<b>What undesirable actions or behaviours by the employee/volunteer have caused the need to consider discipline? Avoid generalities and be specific.</b>
<b>What steps, if any, have already been taken to change or correct the actions noted above? Provide the dates for each step.</b>
<b>Has this person received written notice of unsatisfactory performance? If yes, when? Attach copies of all performance management reviews.</b>
<b>What is the desired outcome from a discipline meeting?</b>
<b>What change in behaviour are you looking for the employee/volunteer to take?</b>

Provided for Charity Village webinar

*"Discipline and Dismissal: Making the best of a difficult situation"*



<p><b>What is the timeline for this change to take place?</b></p>
<p><b>What are the consequences if the employee/volunteer does not change their actions or behaviour?</b></p>
<p><b>What support are you willing to give to the employee/volunteer to assist them in making the required changes?</b></p>
<p><b>When will you meet with the employee/volunteer again to follow up on the desired changes? How will you provide feedback between now and the follow up meeting?</b></p>

**Support tools:**

The follow support tools will assist in having a clear and concise discussion about the required changes to behaviour that you are looking for.

- Relevant Job Description
- Organizational Policy Manual or Handbook
- Employment Contract, if relevant

**Documentation:**

**Verbal Warning:** Following the meeting, email the employee/volunteer the discussion you had during the meeting, outlining the reason for the meeting and describing the required changes to behaviour, the timeline to make the changes, the support you are willing to provide and the consequences if the changes are not made. Place the email on the employee/volunteer's file as an FYI.

**Written Warning:** Following the meeting you will want to document everything that you would from a verbal warning (see above), however you will want to document in letter format, have the employee sign a copy of the letter and place on their personnel file.