

## Guidelines & Templates for Performance Management Documentation

### Sample documentation:

Written Summary of a Verbal Disciplinary Discussion  
Written Warning  
Termination Letters  
Administrative Leave Letter  
Performance Improvement Plan (PIP)

Progressive discipline is an opportunity to educate the employee and to promote successful performance. The goal of any disciplinary action is to improve performance and/or behavior. Policies related to performance management can be found at <http://policies.emory.edu/> under Employee Relations.

### **Sample: Termination Letter - Inability**

Department Header

Date

Employee name & office address

Mr/Ms XXX,

After careful consideration, I have decided to terminate your employment with Emory University, effective date. This has been a difficult decision but a necessary one in the interests of this department's effective operations.

You and I have had many meetings to discuss your performance shortcomings and despite your sincere efforts, your Performance Reviews have not improved. As my most recent Written Warning on date indicated, failure to meet the expectations of the position could result in dismissal. We have made every effort to help you improve and learn the duties of your position but feel that it is simply not a good match for your abilities. Emory University Human Resources Policy, 4.65, Separations from Employment, provides a no-fault separation for these reasons,

- The employee lacks the necessary skills and abilities to perform the job
- The employee is not able to perform the essential functions of the job on a regular basis and reasonable further accommodations cannot be made

You will be eligible to apply for other positions at Emory for which you might qualify. You may contact Jennifer Jeffries-Gallagher, Recruiting Manager, at 404-727-7252, to assist you in that process. I will be happy to serve as a reference for you.

Optional: You may request a personal leave of absence in 30-day increments up to a total of 90 days while you look for another position at Emory. All requests for continued personal leave should be in writing on a leave of absence request form two weeks prior to the beginning of the leave period. You may use your accrued vacation leave to be paid while on personal leave of absence until it is exhausted. After your accrued leave is exhausted, provided you continue regular employee contributions, the personal leave status will allow you to maintain eligibility in Emory's health care plan at the active employee rate.

As of today's date, our records indicate you have \_\_\_\_\_ vacation hours. Upon termination, you will be paid for any accrued vacation, up to a maximum of 240 hours. Should you transfer to another position within Emory University, accrued vacation, sick leave, and floating holiday leave would transfer. Contact name, Benefits Specialist, Human Resources, phone number, to discuss your benefits options.

Name, this has been a difficult decision and I sincerely wish you success in finding another position that will be a better match for you.

Sincerely,

By my signature below, I hereby acknowledge that I received a copy of this notice of discipline. My signature does not necessarily indicate agreement with the contents.

\_\_\_\_\_  
Employee Name

\_\_\_\_\_  
Date

cc.:    xxxxxxx  
      xxxxxxx