

TIP SHEET: Documenting Performance

From *Termination of Employment* by Clark Reed / Netgain Partners Inc.
(Cultural Careers Council Ontario and Cultural Human Resources Council, 2003).

- 1. Review your organization's policies and the employment offer letters.** Make sure that there is nothing that specifies length of employment or indicates employment lasts "as long as performance is satisfactory" or something similar.
- 2. If the organization has organizational and employee policies in writing, follow them.** If you find that you're always making exceptions to the rules, then change the rules. Clearly they're no longer acting as useful guidelines.
- 3. Establish reasonable standards of conduct and give them to your employees in writing.** They should be written in simple, straightforward language. You should also have your employees sign an acknowledgment that they are aware of and have read your organization policies and standards of conduct and that they agree to follow the rules you have established, and that failure to observe those rules could eventually lead to termination.
- 4. As soon as a performance problem crops up, start documenting your communications to your employee.** Generally, it's best to follow a progressive communication process: clear verbal feedback, written warning that unless there is an improvement in performance their job is in danger, and if necessary followed by termination.
- 5. Anytime you are notifying an employee that their job is in danger, it should be in writing.** It's a good idea to have another person present in these types of performance counseling sessions, if at all possible.
- 6. Provide your staff with periodic performance reviews, both formal and informal, that are fair and honest.** Make sure your staff are recognized when they are doing well, where improvement or development is needed, and what the outcome will be if performance doesn't improve.
- 7. Know the steps you need to follow in the termination process and plan it ahead.**
- 8. Treat the individual with respect and preserve their dignity during the whole process.**
- 9. Keep all discussions confidential.**
- 10. Document the termination – you may need to refer to these notes if the individual takes legal action.** Communicate the facts consistently and honestly when you are asked.

NOTE: The legal aspects of termination are governed by legislation and are subject to change. For definitive rules on employment standards and legal aspects of terminations, consult a labour lawyer or human resources specialist and refer them to the Ontario Ministry of Labour (www.labour.gov.on.ca).