



## Performance Discussion Worksheet (Pre-Meeting)

Name of Employee: \_\_\_\_\_ Date: \_\_\_\_\_

Supervisor: \_\_\_\_\_

Type of Problem:  Attendance       Performance       Conduct

Basic Issue / Overall Concern: \_\_\_\_\_

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Desired Performance: \_\_\_\_\_

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Actual Performance: \_\_\_\_\_

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Impact (The good business reasons why the problem must be solved): \_\_\_\_\_

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Consequences (The logical consequences the individual will face if (s)he fails to correct: \_\_\_\_\_

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The Five Questions:

- Did the employee clearly understand the rule or policy that was violated?
- Did the employee know in advance that such conduct would be subject to disciplinary action?
- Was the rule violated reasonably related to the safe, efficient, and orderly operation of the organization?
- Is there substantial evidence that the employee actually did violate the rule?
- Is the action planned reasonably related to the seriousness of the offense, to the employee's record with the organization, and to action taken with other employees who have committed a similar offense?

The discussion is intended to be a:

- Performance Improvement Discussion
- Reminder 1
- Reminder 2
- Decision-Making Leave