

**Palm Beach County Library System**

**Preparing to Meet with the Employee to Discuss Performance Issues**

**Supervisor's Checklist**

Employee's Name: \_\_\_\_\_

Counseling Meeting Date: \_\_\_\_\_ Time: \_\_\_\_\_  1<sup>st</sup> meeting  2<sup>nd</sup> meeting  3<sup>rd</sup> meeting  other

Supervisors Signatures: 1. \_\_\_\_\_ 2. \_\_\_\_\_  
(Two required)

- 1. Obtain written observations from other supervisor(s) or witness(es), or parties involved, if possible, when the incident is serious.
- 2. Gather supporting documents. (Examples: SIRSI records, employee HRIS attendance audit, customer service complaint letter, emails, etc.)
- 3. Is this incident a potential violation of Merit Rule #7, offense #9 or higher?  Yes  No

- 4. State the purpose of the meeting. State the employee's behavior or performance issue was observed on X date. (Situation)
- 5. Describe the actions that were observed. (Behavior) 

Meeting with employee using the SBI model.
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- 6. Provide the employee an opportunity to respond to the supervisor's question, "Please tell me what happened." Record the employee's response and if it is a Merit Rule #7, offense #9 or higher violation, obtain a written statement of the employee's version of the issue.
- 7. Explain how employee performance impacts the work group etc. and state that the procedure or policy was not followed. (Impact)
- 8. State the corrective action. (Example: retraining, EAP referral, scheduled weekly meetings, employee will eliminate this behavior, etc.)
- 9. Schedule a meeting with your supervisor. Bring a summary of the meeting, timeline and other supporting documents.