

Palm Beach County Library System

Meeting with the Employee for Correcting Performance/Conduct

Branch Manager/Area Coordinator or Division Head Checklist

Employee's Name: _____ Location and Title _____

Is this employee on probation? Yes No Is this employee a Supervisor? Yes No

Counseling Meeting Date: _____

1. Dates of previous counseling meetings _____

Previous counseling or disciplinary action within the year - check all that apply

Memos _____

Record of Employee Counseling _____

Written Reprimand(s) _____

Suspension(s) _____

Was a similar behavior addressed in the last annual review? Yes No

2. Confirm Supervisor's checklist was completed up to step 8 with supporting documentation.

3. Was this incident a result of :

• Lack of knowledge/training? No Yes If yes, date(s) of retraining _____

• Disregard of policy, procedure or rules? Yes No

• Other _____

4. Discuss with Division Head/Assistant Director and determine appropriate disciplinary action.

5. How was this incident documented?

Memo for supervisors in-house file

Record of Employee Counseling

Performance Improvement Plan

Merit Rule Violation (Formal Discipline): Written Reprimand Suspension

6. Present documentation (see above) to employee. This is done by the supervisor and one witness. In Branch Division that Branch Manager and one witness must present the written performance correction (memo, counseling form or merit rule violation) to employee.

7. Note employee's response. Tell the employee that they may respond in writing to any disciplinary action and that their response will be retain the documentation. Tell them about the grievance rights as they pertain to letters of reprimand and suspensions.

8. Give a signed copy of the action to employee and all parties. The original of the 1st counseling memo is retained at supervisor's file. The original of Supervisor memo or Record of Employee Counseling with documentation is sent to Library Personnel Services Coordinator for Division Head signature and to file at HQ/Personnel. Written Reprimands/Suspensions are sent to Library Personnel Services Coordinator for Administration signatures. Fully signed copies are supplied to all parties.