

Employee Information:

Employee Name: _____

Today's Date: _____

Employee ID: _____

Hire Date: _____

Position: _____

Supervisor: _____

Instructions:

1. The employee's direct manager will begin by filling out the Performance Improvement Plan form.
2. The employee's direct manager will then conduct a formal meeting with the employee and together, they will fill out the Improvement Plan forms.
3. Together, they may complete the Review Timeline portion and agree on all review dates.
4. Once the form has been completed, it may be reviewed and approved by the HR Manager or another member of senior management. The HR manager/senior leader will review to ensure the objectives, standards, timeframe and goals are fair, achievable and obtainable without strain or hardship to the employee or the business.
5. Once the form has been approved, action towards improvement will begin.
6. A new Weekly Review Form page should be used for each review meeting to keep track of progress. Overall progress should also be tracked on the Review Timeline & Tracker form.
7. Prior to the final review meeting with the employee, the direct manager should meet with the HR Manager to share next steps. If termination is the next step, follow all termination procedures. If a continuation of the plan is the next step, update the plan to reflect the ongoing efforts.
8. During the final review meeting, inform the employee of the overall outcome. If the outcome is termination, be sure to follow all termination procedures with the employee including final paycheck per state laws.

Acknowledgment: (to be signed by all parties prior to PIP implementation)

By signing below:

- I understand and acknowledge that I have reviewed the PIP process and will adhere to the guidelines outlined.
- I understand and acknowledge that weekly improvement must be achieved and maintained during and after the PIP process. If not, additional corrective action, up to and including termination may occur at any time.
- I understand and acknowledge that if/when I complete the PIP process, I must continue to meet performance expectations or further action up to and including termination may occur.

Employee Signature: _____

Date: _____

Employee Print Name: _____

Supervisor Signature: _____

Date: _____

Supervisor Print Name: _____

Approver Signature: _____

Date: _____

Approver Print Name: _____

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Performance Improvement Plan - Action Plan

Performance Details:

Describe what behaviors, practices or performance areas need improvement: _____

Improvement Objectives: What specifically must the employee do to improve his/her performance (completed by the supervisor)	Objective 1	Objective 2	Objective 3
Performance Expectations: What are the expected performance standards for the improvement objectives? (completed by the supervisor)	Performance Expectations	Performance Expectations	Performance Expectations
Action: What specifically will the employee do to improve his/her performance to expected standard? (completed by the employee)	Outline Necessary Actions	Outline Necessary Actions	Outline Necessary Actions
Support: What additional support or development is required to achieve the expected standards of performance? (completed by the employee)	Describe Necessary Support	Describe Necessary Support	Describe Necessary Support
Timeframe: When will this objective be completed? (determined by employee and supervisor)	Set a Deadline	Set a Deadline	Set a Deadline

Performance Improvement Plan - Review Timeline & Tracker

Review Timeline:

PIP Start Date: _____

PIP Final Review Date: _____

This PIP process will be reviewed: weekly bi-weekly monthly other _____

This PIP should not be understood to provide the employee with an expectation of continued employment for any specific period of time. Employment during this period as well as all others will remain at will. If during the PIP process, performance standards are not met, the employee may be subject to corrective action up to and including termination.

Review Date:	Overall Outcome to Date:		
/ /	<input type="checkbox"/> Improvement Needed	<input type="checkbox"/> Meets Expectations	<input type="checkbox"/> Exceeds Expectations
/ /	<input type="checkbox"/> Improvement Needed	<input type="checkbox"/> Meets Expectations	<input type="checkbox"/> Exceeds Expectations
/ /	<input type="checkbox"/> Improvement Needed	<input type="checkbox"/> Meets Expectations	<input type="checkbox"/> Exceeds Expectations
/ /	<input type="checkbox"/> Improvement Needed	<input type="checkbox"/> Meets Expectations	<input type="checkbox"/> Exceeds Expectations
/ /	<input type="checkbox"/> Improvement Needed	<input type="checkbox"/> Meets Expectations	<input type="checkbox"/> Exceeds Expectations
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/ /	<input type="checkbox"/> Improvement Needed	<input type="checkbox"/> Meets Expectations	<input type="checkbox"/> Exceeds Expectations
/ /	<input type="checkbox"/> Improvement Needed	<input type="checkbox"/> Meets Expectations	<input type="checkbox"/> Exceeds Expectations
Totals	Total: _____	Total: _____	Total: _____
After Final Review Overall Decision:	<input type="checkbox"/> No Improvement	<input type="checkbox"/> Met Expectations	<input type="checkbox"/> Exceeded Expectations

Conclusion: (to be completed prior to final meeting with the employee)

Upon final review of the PIP, recommended next steps include:

- Demotion
- Termination
- PIP removed and employee is to return to regular duties
- PIP will be extended to: _____ / _____ / _____ [DATE]

Supervisor Signature: _____

Date: _____

Employee Signature: _____

Date: _____

Performance Improvement Plan - Weekly Review Form

Review Date: _____

Improvement Objectives: What specifically must the employee do to improve his/her performance (completed by the supervisor)	Objective 1	Objective 2	Objective 3
Performance Rating: What level of performance improvement rating has the employee achieved to date?	Weekly Performance Rating <input type="checkbox"/> No improvement <input type="checkbox"/> Some improvement <input type="checkbox"/> Improved	Weekly Performance Rating <input type="checkbox"/> No improvement <input type="checkbox"/> Some improvement <input type="checkbox"/> Improved	Weekly Performance Rating <input type="checkbox"/> No improvement <input type="checkbox"/> Some improvement <input type="checkbox"/> Improved
Timeline: How close is the employee to meeting the improvement objectives to date?	Weekly Timeline Rating <input type="checkbox"/> Behind schedule <input type="checkbox"/> On schedule <input type="checkbox"/> Ahead of schedule	Weekly Timeline Rating <input type="checkbox"/> Behind schedule <input type="checkbox"/> On schedule <input type="checkbox"/> Ahead of schedule	Weekly Timeline Rating <input type="checkbox"/> Behind schedule <input type="checkbox"/> On schedule <input type="checkbox"/> Ahead of schedule
Support: What additional support or development is needed by the employee, to achieve the expected standards of performance? (completed by the employee)	Necessary Support	Necessary Support	Necessary Support
Objective Achieved: Has the employee met the standards and achieved this objective? (completed by the supervisor)	Objective Achieved? <input type="checkbox"/> Yes <input type="checkbox"/> No	Objective Achieved? <input type="checkbox"/> Yes <input type="checkbox"/> No	Objective Achieved? <input type="checkbox"/> Yes <input type="checkbox"/> No
Overall Weekly Progress Rating: Where is the employee's progress at to date? (completed by the supervisor)	This weeks' progress: <input type="checkbox"/> Improvement Needed <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Exceeds Expectations		

Supervisor Comments: _____

Employee Comments: _____

Supervisor Signature: _____

Date: _____

Employee Signature: _____

Date: _____

Performance Improvement Plan - Fact Sheet

Purpose:

The purpose of a Performance Improvement Plan (PIP) is to help the employee improve his/her work performance to an acceptable standard and in a satisfactory manner.

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Best Practices:

- It is recommended that a PIP process not exceed 60 days initially.
- A general practice is to meet with the employee as often as possible (weekly) to ensure improvement is made and goals are achieved.
- If at any point in the PIP process, significant improvement has not been made by the employee, immediate next steps can be taken up to and including termination.
- Upon completion of the PIP process, the goals, actions, and performance standards must be maintained at all times moving forward or further action up to and including immediate termination may occur.
- Once the review dates have been set, both parties must do everything possible to make sure they do not miss the review meetings.
- Have the direct supervisor coach the employee outside of the reviews as often as possible to help provide the employee with their best chance for success. The overall goal of a PIP is to help the employee succeed. If instead, termination is wanted and warranted, it is best to spare the employee and anyone else involved the time and energy that a PIP process involves.

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