

GUIDELINES FOR WRITING A COUNSELING MEMO

- The memo is a summary of the counseling session. Do not include other matters in the memo that were not discussed in the session.
- Write the memo to the employee and give it to the employee promptly, within several days following the counseling session.
- Be concise and clear.
- Do not characterize the content as discipline or as a penalty.
- Do not write the memo in a punitive or derogatory manner. The tone should be factual.
- If the employee was advised during the session that assistance is available to help the employee with personal problems, such as the Employee Assistance Program (EAP), include that information in the memo.
- Include a signature line at the end for the employee. If the employee refuses to sign, note it on the memo. The employee should be informed they have the right to respond in writing to the memo and have that response placed in their official personnel file.
- Make two (2) original copies. Give one original copy to the employee and forward the other original copy to Human Resources for placement in the employee's official personnel file.

Include the following sections

- A statement of the reason for the meeting.
- The employee's response to your concerns.
- The manner in which the employee will seek to improve performance.
- Provisions for follow-up, where appropriate, such as a meeting to review progress.