**Performance Improvement Plan (PIP)**

**Record of Review Meetings**

**Employee Details**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Employee:** | Click to enter text | **Department:** | Click to Select |
| **Job Title:** | Click to enter text | **Name of Manager:** | Click to enter text |

**Review Meeting**

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| --- | --- | --- | --- | --- | --- |
| **Capability Stage:** | Click to Select Stage | **Review Meeting:** | Click to Select Number | **Held On:** | Click to Select Date |
| **Objective 1:** | **Notes:** |
|  |  |
| **Objective Achieved?** | Yes: | [ ]  | No: | [ ]  | **Standard Sustained?** | Yes: | [ ]  | No: | [ ]  |
| **Objective 2:** | **Notes:** |
|  |  |
| **Objective Achieved?** | Yes: | [ ]  | No: | [ ]  | **Standard Sustained?** | Yes: | [ ]  | No: | [ ]  |
| **Objective 3:** | **Notes:** |
|  |  |
| **Objective Achieved?** | Yes: | [ ]  | No: | [ ]  | **Standard Sustained?** | Yes: | [ ]  | No: | [ ]  |
| **Objective 4:** | **Notes:** |
|  |  |
| **Objective Achieved?** | Yes: | [ ]  | No: | [ ]  | **Standard Sustained?** | Yes: | [ ]  | No: | [ ]  |
| **Objective 5:** | **Notes:** |
|  |  |
| **Objective Achieved?** | Yes: | [ ]  | No: | [ ]  | **Standard Sustained?** | Yes: | [ ]  | No: | [ ]  |
| **Objective 6:** | **Notes:** |
|  |  |
| **Objective Achieved?** | Yes: | [ ]  | No: | [ ]  | **Standard Sustained?** | Yes: | [ ]  | No: | [ ]  |

**Confirmation Signatures**

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| **I confirm this is an accurate record of the objective review meeting and outcome:** |
| **Employee Signature:** |  | **Date Signed:** | Select Date … |
| **Manager Signature:** |  | **Date Signed:** | Select Date … |

**Guidance on Completing this Form**

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| --- |
| **Employee Details**Click in the boxes to input text. The boxes do not have a character limit. For ‘Department’, click in the box and select from the drop-down menu.**Review Meeting**1. Capability Stage - click in the ‘Stage’ box and select from the drop-down menu. You have three options – Stage 1 Informal, Stage 2 Formal and Stage 3 Final. The stage you select should match the stage showing on the PiP.
2. Review Meeting - click in the ‘Select Number’ box and select the meeting number from the drop-down menu. The review meeting number should follow those detailed on the PiP document. For the last meeting, select ‘Final’.
3. Held On - click in the ‘Select Date’ box and select the meeting date from the calendar provided in the drop-down menu. The date of the review meeting should match the number and date given on the PiP document.

**Objectives**Prior to the meeting, input each objective. The boxes do not have a character limit and will expand as you type (or copy from the PiP and paste into this document).**Notes**At the meeting, you should discuss each objective with the member of staff. You should confirm whether the objective has been achieved.If an objective has been achieved and further review meetings are to take place for the remaining objectives (or a final review meeting) you should confirm at these later meetings whether the employee is sustaining the required standard.Following the meeting, *summarise* the discussion for each objective. The boxes do not have a character limit and will expand as you type. If you agree to amend any of the objectives, you should note the new objective in your summary.* Objective Achieved? – Make sure you click in either the Yes or the No box at the bottom of the notes field for each objective.
* Standard Sustained? – If an objective has previously been achieved, make sure you click in either the Yes or the No box at the bottom of the notes field to confirm if the employee is continuing to meet the required standard.

**Confirmation Signatures**Once you have completed the form, provide a copy to the employee. You must both sign and date the form. Select the date from the drop-down calendar. You can sign the form in a number of ways:* Upload a JPEG image of your signature.
* Select the date the form is going to be signed from the drop-down calendar for both you and the employee. Then print the form, both sign it, then scan it and save it.
* The employee sends you an email to confirm the review notes are an accurate record of the meeting. You will need to save the email.

**Further Review Meetings**You should use a new form for each review meeting, choosing a new meeting number and date accordingly. If you have agreed to amend an objective in a previous review meeting, you should detail the amended objective in the appropriate Objective box for subsequent review meetings. You do not need to add the original objective, as this can be seen on the PiP and earlier review forms.If an objective has previously been achieved, you should confirm whether the employee is sustaining the required standard.**Formal Stages**If the employee does not achieve the objectives and you move to stage 2 of the procedure, you should complete a new PiP. A third new PiP will be required if final stage proceedings are reached. Make sure you select the correct stage from the drop-down menu when you complete each new PiP. The objectives may be the same, or they may have been amended during the review period. The new PiP should detail the up-to-date objectives. The original PiP and the records of review meetings will provide confirmation of the employee’s progress at each stage of the procedure.Each stage will require review meetings. You should continue to use this form for these reviews. |