

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 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.
- Give the original copy to the employee and forward a 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.



COUNSELING MEMORANDUM

TO: _____ **DATE:** _____

FROM: _____ **RE:** _____

On _____ we met to discuss your unacceptable conduct and/or performance.
Date

The unacceptable conduct or performance is _____

It is unacceptable because _____

Your response or comment was _____

Your performance or conduct can be improved by _____

A follow-up meeting to discuss this matter will be scheduled _____
Date

Counseling is intended to be a constructive process to assist you to identify, discuss and remedy aspects of your job performance or conduct that need improvement. As noted above, these aspects have been discussed with you and require your immediate attention.

Failure to correct your performance may lead to further administrative action including discipline .

If applicable: _____ I have informed the employee of the Family Medical Leave Act (FMLA)
_____ I have informed the employee of Employee Assistance Program (EAP)

Signature of Employee / Date

Signature of Supervisor / Date

The employee's signature is to acknowledge receipt of this counseling memo and does not necessarily signify the employee's agreement with its content.

Original to: Employee
Copy to: Employee's Official Personnel File in Human Resources
Immediate Supervisor - Department Head



COUNSELING MEMORANDUM

TO: _____ **DATE:** _____

FROM: _____ **RE:** _____

This is to summarize our conversation on _____

We discussed _____

You stated _____

You were informed _____

In conclusion _____

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