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CHIEF STUDENT SERVICES OFFICERS (CSSO) ANNUAL STUDENT SERVICES CONFERENCE

How to Write It Right: An Advanced Course on Discipline and Performance Documentation

9/16/2021

PRESENTED BY:

Eileen O'Hare-Anderson &
Monica M. Espejo

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How to Write It Right: An Advanced Course on Discipline and Performance Documentation

Chief Student Services Officers (CSSO)
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Presented By:
Eileen O'Hare-Anderson & Monica M. Espejo

Importance of Performance Evaluations

- Communication tools
- Should be utilized to give **honest**, clear, relevant, and meaningful feedback
- Properly done:
 - Recognize good performance; and
 - Identify specific performance deficiencies

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- We are busy
- Detailed evaluations are time consuming
- It is uncomfortable to give constructive criticism
- We are taught, “if you can’t say something nice, don’t say anything at all!”

- To avoid confrontation
- “Magical thinking” – somehow employee will improve with time without coaching or counseling
- Fear of grievances and other legal action

At Work:

- Lose important communication tool
- Inaccurate record of employee's performance
- Cannot take needed disciplinary actions
- Loss of credibility as a supervisor/manager



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Writing Tips

Four Things to Remember:

1. Focus on the facts
2. Remember what to forget
3. Tell the whole story
4. Look to the future



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Focus on the Facts



Focus on the Facts

Language should be:

- Objective
- Direct & concrete
- Descriptive & specific
- Focused on behavior & actions



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Focus on the Facts

Objective language:

- Helps employee understand supervisor's expectation
- Tells employees what skills/behaviors need improvement
- Cannot be described as "an opinion"
- Not personalized



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Focus on the Facts

Descriptive/specific language:

- Does not use generalities or conclusions
- Write like a journalist would. Answer the Who? What? When? Where? Why?



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Focus on the Facts

Action/behavior language:

- Does not focus on attitude or personality
- Tells reader what employee *did/didn't do*
- Focuses on the behavior itself, not supervisor's reaction to the behavior



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Focus on the Facts

Example regarding objective language:

Bad: Ashton has a problem being on time.



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Focus on the Facts

Example regarding Ashton:

Better: Ashton was late on ten different dates this year (list dates). Ashton did not call in ahead of time to inform anyone that they would be late.

Focus on the Facts

Example regarding descriptive/specific language:

Bad: Pat's work is sloppy.

Focus on the Facts

Example regarding descriptive/specific language:

Better: Pat's most recent FTES report contained three typos and did not include a cc: to the appropriate supervisor.



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Remember What to Forget



Remember What to Forget

Do not mention things that could create liability:

- Example: protected leaves, such as FMLA leave or baby bonding time
- Protected status
- “Staying late”/unreported overtime
- Disabilities



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Remember What to Forget

Do not include personal feelings or opinions:

- Words such as “likeable” or “unpleasant”
- “Kelly often seems unhappy when she is given additional work”
- “Sam is immature”



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Remember What to Forget

Do not include conclusion statements:

- “Adrian does not have the skills to perform his duties”
- “Dana is not a good team player”



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Remember What to Forget

- Adrian has not consistently met their workload goals this quarter. They were four days late with their first analysis and five days late with the second. They also failed to learn the new software system during the three-week test period.
- Dana failed to include two co-workers on important emails about the orientation video project so they did not meet required deadlines for the project.
- Hayden had extra time on Thursday, July 14 when I observed him shopping online, even though he knew Loren asked for help completing an assignment.



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Remember What to Forget

In remembering what to forget, do not forget any critical information:

- If an employee is currently on a PIP
- If the supervisor started mid-year
- Progress over time
- Prior discipline
- Positive attributes



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Remember What to Forget

Example regarding protected leave:

Bad: Adrian missed two trainings when they were absent due to their depression but made them up later.



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Remember What to Forget

Example regarding Adrian:

Better: Adrian has completed all the required trainings this year.



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Tell the Whole Story



Tell the Whole Story

Questions to answer:

- Who?
- What?
- Where?
- When?
- How often?



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Tell the Whole Story

- Identify facts
- Identify issues
- Identify purpose



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Tell the Whole Story

Re-Read and Re-Examine:

Ask yourself, "What questions would I still have about this if I were a new supervisor taking over?"

Tell the Whole Story

Example:

Taylor fails to sign out before he uses a district vehicle.

Tell the Whole Story

- How often does Taylor fail to sign out?
- Is signing out required under a certain rule or policy?
- Has Taylor been warned about this before?
- How often does Taylor use a district vehicle?
- What are the consequences or effects of Taylor not signing out?



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Tell the Whole Story

Taylor is required to sign out before using a district vehicle so that his supervisor is aware of Taylor's location and the exact time he began using the vehicle. Taylor uses a district vehicle three times a week, and in the past quarter, Taylor has forgotten to sign out 6 times (3/7, 3/18, 4/12, 5/20, 5/26, and 5/31). On each occasion, I directed Taylor that sign out of vehicles is required. When Taylor fails to sign vehicles out, other employees check the schedule sheet and expect certain vehicles to be at the facility, unaware they are being used. The next time Taylor fails to sign out, Taylor will receive a written reprimand in his personnel file.



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Look to the Future



Look to the Future

Positive Feedback:

- Gives a complete picture
- Helps motivate employee
- Sets goals for future behavior



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Look to the Future

Positive Feedback:

- Use same techniques already discussed
- Praise should not encourage complacency
- Set goals
- Outline expected future growth

Look to the Future

- Set performance objectives
- Outline clearly
 - Specific results to achieve
 - Behaviors to model

Look to the Future

Ways to Help:

- Coaching
- Trainings
- Resources



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Conclusion

- Follow the tips
- Remember the importance and impact of documentation
- Read and re-read before finalizing a memo or evaluation
- Practice



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Thank You!

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