Formal Performance Warning in Writing [Sample]

Rana,

Per our discussion, I wanted to capture how we're moving forward. As I mentioned, I realize that you've been trying very hard, but unfortunately, your performance isn't where I need it to be. We've had multiple conversations over the last few months about your role expectations, which include advance planning to make grant deadlines, being able to drive simultaneous projects with few dropped balls, and attention to detail so grant reports meet funder guidelines. I've done what I can to support you and remove barriers to your performance—we've gotten into the habit of tracking big rocks in weekly check-ins, we asked the admin team to automate deadline reminders, and we created checklists. We also added more time to our check-ins for me to help you troubleshoot.

Be clear from the beginning where things stand in the process. Summarize what support has been offered, what needs to happen next, and be explicit about dismissal as a possible consequence.

Without significant improvement in the next four weeks, I will have to let you go. The improvements outlined in this plan need to happen within the next month and they need to be sustained going forward.

My hope is that you will meet the expectations laid out in this plan. I've attempted to be clear and specific about what these expectations are; please let me know if you have any questions about what follows, so I can clarify. The key areas in which I need to see improvement are: *consistent timeliness on grant reports, accuracy, and proactive communication when help is needed to ensure we make the deadline every time.*

Give a headline summarizing the must-have competency that needs to be demonstrated.

I want to take a moment to review my expectations in each of these areas:

- **Timeliness:** In terms of timeliness, you will get reports to me three days before they are due for review and approval. Given the volume of development work, I need to trust that when I hand you an item, it is as good as done and the items on your plate, especially grant reports, are handled.
- **Accuracy:** Over the next four weeks (and moving forward), my expectation is that there might be one instance of inaccuracy or one slip-up regarding quality, but not more, and no missed grant deadlines. Everyone is human and mistakes happen from time to time, but I expect you to not make repeat mistakes, and to catch and correct those that do occur.
- **Proactive Communication:** As I've said before, it's our team norm to ask for help, so one of my expectations is that you'll communicate requests for help in advance so we can support you to make deadlines when unanticipated things impact your work. You should continue to handle routine issues that cross your plate that are not bigger projects—e.g., reaching out to others around meeting requests, replying to emails and voicemails—within one business day of receiving them. If you are not able to get to items that you normally would within this timeframe, I assume you will let the relevant person know that you are still on top of the item.

Be as specific as possible about the level of performance you're looking for (and how you'll know if it's being reached).

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Reiterate the consequences and be clear about the terms (severance pay) so there is no confusion about what's at stake or how it will happen.

This performance improvement plan (PIP) will be in effect for the next four weeks (starting today). We will check in at the end of next week to review your performance, and weekly thereafter. If you don't fulfill the requirements of this plan, then I would need to let you go, with severance pay, as per our employee handbook.

My hope is that you'll successfully fulfill the performance improvement plan and I really believe that you can. If you do, you will no longer be on an official PIP. You will, however, need to maintain that level of performance.

This is my best attempt to lay out my expectations going forward and the potential consequences and outcomes. What this memo does not do justice to, however, is how much I enjoy working with you and how much I appreciate your hard work and commitment to this organization.

Be kind, honest, and supportive; just be sure it doesn't blunt the substance of your message.

Again, please let me know if you have any questions about what is laid out in this plan.

— Anita

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