

Applies to: All OFMD Staff (as applicable)

GUIDELINES:

Issued: March 29, 2017

Revised: April 25, 2017

PURPOSE:

To establish guidelines in completing an employee meeting summary based upon a general engagement meeting or coaching session.

DEFINITIONS:

Employee Meeting Summary: A document which records a general engagement or coaching session for an employee by detailing specific information including all notes, observations, solutions and further actions

PROCESS:

Each manager/supervisor shall complete an Employee Meeting Summary for their employees (as applicable), to serve as a documented record of employee engagement or coaching. The *Employee Meeting Summary* template is located on the OFMD website under the Guidelines section

<https://facilities.med.wustl.edu/about/facilities-management-guidelines/>

Once the employee engagement or conference record document has been downloaded, please fill out the following information:

1. Employee Name
2. Employee ID
3. Employee Job Title
4. Employee Hire Date
5. Supervisor/Director Name
6. Department
7. Meeting Date

Select General engagement or Coaching:

General engagement: is a general employee meeting that supervisor wants to document.

Coaching: is for a) mentoring for improvement or providing information, such as how one may access education or benefits, or b) non-disciplinary performance “coaching” first interaction on potential performance or attendance issues etc.

An Employee Meeting Summary will be completed for a general engagement or coaching session. Five sections to complete will provide the comprehensive details:

- A. **Previous Communications:** Identify and describe any previous general engagement or coaching sessions.

- B. **Notes** and Information: Describe what happened and provide details of the general engagement or coaching session.
- C. **Observations:** Identify and describe the purpose of the meeting.
- D. **Solutions (if applicable):** Outline suggestions and/or resources to help the employee meet those established expectations and modified behaviors. Within this section, be sure to include the employee's commitment to meeting these observations.
- E. **Actions (if applicable):** Identify the action(s) you as supervisor will establish if employee does not meet expectations and their given observations as related to this incident. Make sure to include what steps will be taken if the employee's behavior does not change.

Please complete the following as applicable:

1. Any previous documented general engagement or coaching with the employee should be noted and attached to the current employee-meeting summary. If none exists, please just make a notation.
2. Please ensure that only facts are used and provide details specific only to the occurrence being documented within the record.
3. If applicable, it is recommended to cite any University or OFMD guideline or policy that the employee's incident or behavior has not complied with. Please make sure to provide a copy of related guideline or policy to the employee.
4. If applicable, the period for improvement will be determined by the manager/supervisor and as accordingly based on the incident. The follow up date selected should be aligned within period determined. Manager/Supervisors must ensure that a follow up is completed as stated on this record.

The manager/supervisor will complete the Employee Meeting Summary and discuss this with the employee. If a disciplinary action, the employee will be asked to sign the written record. A completed and signed copy of the Employee Meeting Summary will be given to the employee and a copy will be sent to OFMD HR office to retain within the personnel files. If not a disciplinary action, it will be noted as a note to the HR file.