**TEMPLATE—COUNSELING MEMO**

* **PUT ON APPROPRIATE LETTERHEAD**
* **DRAFT MUST BE REVIEWED BY HR BUSINESS PARTNER OR EWR BEFORE DELIVERY**
* **DATE OF MEMO SHOULD REFLECT DELIVERY DATE**
* **COUNSELING MEMOS ARE NOT KEPT IN PERSONNEL FILES. HRBP/GENERALIST/SUPERVISORS ARE EXPECTED TO KEEP SEPARATE RECORDS**
* **EMPLOYEE MAY RESPOND IN WRITING TO THE COUNSELING MEMO AND RESPONSE SHOULD BE ATTACHED TO THE MEMO**

**Date:**

**To: [employee name]**

**From: [supervisor name]**

**RE: Counseling Memorandum**

This memo is to confirm our conversation on **[date]** during which we discussed my concerns about **[issue].**

**[Describe incident or behavior in detail, as well as any prior conversations about it and any reasons given by employee. Explain and cite any UC/UCI policy or procedure violated, any written work rule violated, or any established performance metric not met. Explain the negative impact of the behavior.**

* **As applicable, tie expectations to what has been previously communicated in position descriptions, job leveling charts, or written work assignments and point the employee to those documents as reference.**
* **Use clear, specific examples of performance and/or behavior being counseled.**

**If applicable, arrange event information in chronological order and tag each occurrence with an introductory date stamp.** **[Describe expectations for the future related to the incident or behavior noted above.]**

This memo is not discipline. It is to inform you of my expectations and your need to adhere to them. Failure to improve your [performance/conduct] and adhere to the above outlined expectations may lead to the initiation of progressive discipline.

If you have any questions regarding this matter, please feel free to discuss them with me.

C: HRBP

EWR