

## Disciplinary Action, Coaching and Documentation

- Setting up for success - Sound policy/Clear expectations/Communication/Employee acknowledgement/Consistency –  
ERG, Policies on Portal, Operational manuals
  - Employee acknowledgment helpful
  - Not all policies can/must be written out (common sense) e.g.) conduct on/off duty, safety
  - Consistency - amongst employees, within/across departments and business units
- Disciplinary Action (misconduct) vs Coaching (performance)
  - Disciplinary Action (misconduct) - behavior that is sufficiently serious to cause damage to other employees, guests or the business and involves a breach of employment policies or laws, etc.
    - Progressive discipline
      - Document Only, First Warning, Second Warning, Final Warning, Suspend Pending Investigation (SPI) if applicable, Termination
        - Employee signature preferred for all steps. Required for First through Term.
        - Steps can be skipped based on severity of misconduct
        - HR must be involved in Final Warning, SPI, Termination
          - Feel free to consult HR for all steps prior to issuing \*Get it right the first time
- Coaching (performance) - employee is not meeting the employer's expectations for the quality or quantity of their work
  - There is a clear position description for the employee's role
  - The employer's requirements for the improvement in the employee's performance, including a reasonable timeframe for the improvement, are clear and have been explained to the employee (ideally these requirements are measurable, to reduce the likelihood of a later disagreement)
  - The employee has the resources and support that they reasonably require in order to improve to the required level
- When documenting...
  - Be timely, clear, concise and objective
  - Include only the facts
    - What policy/expectation was violated – Reference acknowledged policy (ERG, Policies on Portal; Operational manuals)
      - Witness statements when applicable
    - Who was involved
    - When – specific time(s), dates(s)
    - Where – location of violation (if applicable)
- Expectations going forward
  - How policy is expected to be followed
  - Consequences if expectations not met
- **Get Employee Signature!** – If not, note refusal to sign and get witness signature
- Send signed form to HR manager to be included in employee file. \*If it's not in their file, it doesn't exist