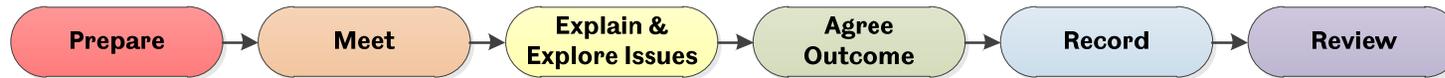


How to carry out an Informal Meeting



Prepare

- ✓ Gather all the facts before inviting the employee to discuss specific concerns.
- ✓ Identify specific examples to draw upon within the meeting e.g. details of conduct or performance issues.
- ✓ Choose a private location and provide adequate time to discuss/explore the issues.
- ✓ Notify employee of informal meeting, either verbally, face to face or in writing by email.
- ✓ Briefly identify what you wish to discuss at the meeting.

Meet

- ✓ Hold an informal meeting.
- ✓ Emphasise that this an informal meeting aimed at supporting the individual in addressing specific concerns/reaching and maintaining the necessary standards.

Explain and Explore Issues

- ✓ Constructively explain concerns, provide examples and keep your comments objective.
- ✓ Outline the impact these concerns are having on the department/area of work.
- ✓ Ensure that some positive feedback is provided, where possible.
- ✓ Together explore any potential causes and provide the employee the opportunity to provide any explanations.
- ✓ Acknowledge any factors beyond the employee's control.
- ✓ Explain the required standards or expectations which are not being met.
- ✓ Explore possible reasons/specific problems/underlying issues preventing improvement.
- ✓ Explore how issues can be addressed. Consider any suggestions the employee may offer to address the concerns.
- ✓ Seek advice (if necessary).
- ✓ Clearly explain expectations and the need for sustained improvement.

Agree outcome

- ✓ Together discuss and agree any follow up action/targets/SMART objectives and responsibilities for attaining a sustained improvement and the proposed timescales
- ✓ Generate a Performance Improvement Plan (PIP)/consider any reasonable adjustments (as appropriate).
- ✓ Consider any possible needs for further development (i.e. training).
- ✓ Consider need for external support (Occupational Health, Counselling etc).
- ✓ Explain that insufficient sustained improvement may lead to more formal action.
- ✓ Outline formal stage if improvement is not reached/situation not remedied. (Refer to relevant procedure e.g. disciplinary/capability).
- ✓ Advise that the key points of discussion/expected improvements/review timetable will be recorded and sent to the employee for information.
- ✓ Check if the individual wishes to add anything or has any questions to ask.
- ✓ Offer some encouragement and end on an optimistic but realistic note.

Record

- ✓ **See Template Record.**
- ✓ Record summary of the discussions, the agreed actions and timescales for improvement etc.
- ✓ Ensure that the records are factual and constructive.
- ✓ Provide employee with a written copy of the record and ask them to sign their agreement that they accurately reflect the discussions/agreements.
- ✓ Store records securely, as these may be subsequently required within later procedural stages and shared with all relevant parties, including the employee.

Review

- ✓ Arrange a follow up meeting to review the situation.
- ✓ Regularly monitor and provide feedback on an on-going basis/not only at the review meeting.
- ✓ Identify whether there is anything else you can reasonably do to help.
- ✓ Address any new issues as they arise.
- ✓ Agree further objectives/set next review meeting, if appropriate.
- ✓ If process is failing to improve performance consult with your HR representative to discuss more formal action.