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## FRISK™ MODEL

## QUICK REFERENCE GUIDE

·	<b>,</b>
<b>F</b> Facts: What did the employee do?	Pinpoint the specific conduct and describe the conduct in complete and explicit terms. If necessary, supplement general statements with specific examples to provide a proper factual foundation.
R Rule: What should the employee have done?	Include the rule, authority or expectation relating to the deficient performance, such as board policies or administrative regulations, labor contract provisions, administrative directives, Education Code sections, recognized professional standards, AND include prior same rule violations.
Impact:  What was the impact of the employee's conduct on the district?	Include facts which describe the negative or adverse effect of the employee's conduct on the district, other employees, students and parents.
Suggestions:  When and what do you want the employee to do to improve performance? What will happen if there is no improvement? How can you help the employee to improve?	Include clear and unequivocal directions on the proper conduct you expect the employee to follow, the effective timelines and the consequences if the employee fails to comply, AND include suggestions for improvement.
K Knowledge:  Does the employee have knowledge of the document as required by Education Code Section 87301?	Include language notifying the employee of the right to file a response to a derogatory document prior to the document's placement in the personnel file.



## FACTS

#### "WHAT DID THE EMPLOYEE DO?"

The "Facts" component is typically included in a disciplinary document as illustrated in this section under *Reference A*, at page 16.

In stating facts evidencing an employee's deficient performance, the evaluator must:

- ☑ Clearly **pinpoint** the specific conduct deemed deficient.
- Describe the specific conduct in **complete and explicit terms** avoiding unnecessary technical language.
- ☑ Avoid factual errors.

## **Pinpointing Specific Conduct**

It is important to **pinpoint** each performance deficiency. Evaluators frequently combine more than one substandard activity into a single general description. This approach is not recommended because it is more difficult to *isolate and track patterns* of deficient performance and to provide *clear directions* for improvement. The better approach is to separately describe and document distinct performance deficiencies.

## Bad Language Examples

An evaluator, having concerns about a clerical employee's excessive typing errors, misfiling of documents, and failure to record telephone messages, COMBINES THESE DEFICIENCIES INTO A BROAD GENERAL DESCRIPTION:

Assists the district in sustaining its burden of proof in disciplinary cases.

#### Including Specific Factual Detail

Legally sufficient documentation must be:

- Complete and clear. The document must be factually specific and not based solely on general statements and conclusions without specific factual foundation.
- Self-contained. The document should contain all relevant information necessary to be fully understood by a third person unfamiliar with the employee's unsatisfactory conduct. FACTUAL ASSUMPTIONS SHOULD BE AVOIDED.
- **Explicit in identifying the problem**. A third party reviewing the document should not have to deduce the problem from the facts.

The **test** for determining whether a factual statement is sufficiently complete and explicit is: Would another person unfamiliar with the employee's unsatisfactory performance understand **what the employee did that created the problem** based on reading the factual statement, **without having to refer to any other information source**?

## Bad Language Examples

- "Your phone message on March 13, 2012 was *confusing* to the Division Dean."
- "You are frequently late to faculty meetings."
- "You went to the gate at 7:30 a.m. on January 15, 2012 and waited 10 minutes before returning to the maintenance yard."
- [Problem not identified.]

## **REFERENCE B**

## **Conclusions v. Facts Comparison**

General Conclusions	Supporting Facts
Numerous, frequently, often.	Eight times.
Violated provision of a labor agreement.	Took a morning break in excess of five minutes per Article II Section 8, page 12 of the contract on March 2, 9, 15 and 21, 2012.
Used an offensive word to a fellow employee.	On June 8, 2012, called John Smith a "jerk."
Is frequently tardy.	Was more than twelve minutes late to work on February 10, 15, 18 and March 2, 2012.
Work station is unclean.	Custodial supply room on May 3, June 3 and 6, 2012 was found to have used rags on the work bench, open containers of solvent, and equipment on the floor.
Inaccurate spelling.	Incorrectly spelled "assignments" and "conference" in a letter dated May 2, 2012.
John Smith was intoxicated.	After returning from lunch at 12:45 p.m. on June 20, 2012, John Smith's speech was slurred. He staggered when he walked, fell against the file cabinets two times, and there was a strong smell of alcohol on his breath.
Karl Jones failed to follow instructions.	On December 12, 2012, at 10:30 a.m. and again at 1:45 p.m., Karl Jones was directed by his supervisor to repair the lock on the door at Room 25. At 2:15 p.m. he still had not followed this directive.



# RULES

#### "WHAT SHOULD THE EMPLOYEE HAVE DONE?"

You have indicated what happened - now you are describing what should have happened. In other words, what was the proper conduct that should have been followed by the employee.

The "Rule" component is typically included in a disciplinary document as illustrated in this section under *Reference A*, at page 29.

The "rule" represents the standard, authority, direction, mandate or expectation that the employee is required to follow.

The inclusion of the "rule" relating to unsatisfactory employee conduct is important because it places an employee on **notice of expected proper conduct** and permits the district to hold the employee **accountable for subsequent recurring violations of the same rule.** 

Generally, the "rule" violated by the employee's unsatisfactory conduct is easy to identify because it is tied to a clearly defined written standard, such as:

- District policies or administrative regulations
- Labor contract provisions
- Job descriptions
- Employee handbook provisions
- Adopted curriculum standards
- Prior administrative directives

"Your conduct was discourteous and disruptive of other employees. You are expected to *refrain from engaging in personal conversation* with other employees and disrupting their work."

Note that the suggested "rules" used in the above problems are not the only performance standards that could apply. The "rules" used may differ among evaluators based on how the misconduct is defined.

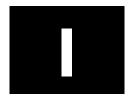
As a **basic tenet**, the "rule" set by an evaluator will be valid if it is:

- ☑ Reasonably clear and understandable;
- Reasonably related to the efficient and orderly operation of the district/school or educational program;
- ☑ Uniformly applied; and
- Not inconsistent with labor contract provisions, board policies, administrative regulations or legal mandates.

## **Including Prior Same Rule Violations**

Prior violations of the **same common rule** by an employee **should be referenced by the evaluator in disciplinary documentation**. This technique is important for the purpose of:

- Emphasizing the recurrent nature of the employee's deficient conduct.
- Establishing patterns of similar deficient conduct for disciplinary action.
- Justifying harsher corrective action under progressive discipline.



# IMPACT

# "WHAT IS THE IMPACT OR POSSIBLE IMPACT OF THE EMPLOYEE'S CONDUCT ON THE COLLEGE OR DISTRICT?"

You have established what the employee did wrong and what the employee should have done - now you are connecting the employee's conduct to the job.

The "Impact" component is typically included in a disciplinary document as illustrated in this section under *Reference A*, at page 40.

"Impact" is important to establish the CONNECTION between **the employee's deficient conduct and its negative impact on the school district** - which may involve students, faculty, staff, or property.

## Examples

- "Your failure to submit student grades in a timely manner resulted in the student not being admitted to Hampton College."
- "Your failure to remove litter from the classroom floor has **created an unsightly appearance** and has required instructors and students to spend unnecessary time during the class period removing the debris, which has disrupted the educational program."
- "Your belligerent attitude toward students as reflected in your sarcastic, demeaning, and rude comments has had an **adverse impact on your effectiveness as an EOP Counselor**, which has resulted in student complaints."
- "Your failure to repair the sprinklers on the athletic field caused the water to leak which exposed students to injury."

As a **general rule**, in documenting the negative impact of unsatisfactory employee performance on the district, the evaluator should state facts which show:

- The **adverse impact** or possible adverse impact of the employee's conduct on the efficient operations of the district, department, and/or educational process. (See examples at pages 37.)
- ☑ The adverse impact or possible adverse impact of the employee's conduct on faculty, staff, and students. (See examples at pages 37-38.)
- The **degree of public notoriety** resulting from the employee's conduct that impairs or is likely to impair the employee's effectiveness to do the job. (For example, to command the respect and confidence of students.)

Establishing the **connection** between the employee's deficient conduct and its adverse impact on the district is necessary in sustaining management's burden of proof in disciplinary cases because it:

- Helps SUBSTANTIATE the degree of seriousness of the employee's deficient conduct for an administrative hearing officer who may not understand the true impact, and
- Helps TIE the **employee's unsatisfactory conduct to the job** where the conduct is abstract or caused by an activity or condition not directly arising from the job itself.

## **Including Impact Facts To Show Seriousness**

Including facts to help clarify or emphasize the **significance of the adverse impact or potential adverse impact** of the employee's deficient conduct on the district (students, staff, faculty, or property) is important. This is particularly true where the *degree of seriousness* of the employee's conduct may not be readily apparent to an

#### **Employees**

- Negative impact on faculty and staff morale.
- Impairment of ability to effectively interact with other employees, thereby adversely impacting the efficiency of the department or college.
- Impairment of ability to command the respect, trust, or confidence of students, other staff or faculty, thereby negatively affecting working relationships and job effectiveness.
- Impairment of ability to successfully perform the essential functions of a position because of loss of confidence or lack of credibility.

In documenting the negative impact of an employee's unsatisfactory conduct on the district (students, staff, faculty, or property), it is recommended that the evaluator contact the Human Resources office to "brainstorm" examples of adverse impact evidence. Every effort should be made to include all identifiable examples of adverse impact in order to sustain management's burden of proof in disciplinary cases.

#### **Negative Impact Evidence Examples**

- "Your excessive absences as an Equipment Technician during the past seven months have resulted in the **deterioration** of the biology program because of lack of continuity in laboratory set-up. Twenty percent of the scheduled laboratory classes have been **cancelled** due to the unavailability of trained assistants. The biology students have not been given the opportunity to conduct the required biology experiments. As a result, we have received 12 **complaints** from students requesting that they be given a refund of their fees."
- "Your conduct [calling a student "stupid" during student orientation] caused **embarrassment** to the student and resulted in the student filing a **complaint** with the Vice President for Student Affairs. These types of comments can cause students to lose self-esteem and can have a negative effect on learning."
- "Your conduct [threatening colleagues and using profane language] has had a **negative effect** on staff morale in the Business Department. Your comments have **impaired** your ability to



## SUGGESTIONS/DIRECTIONS

# "WHAT SHOULD THE EMPLOYEE DO TO IMPROVE PERFORMANCE?"

You have previously told the employee what happened and what should have happened, and you have connected the employee's conduct to the job. Now you are identifying what must be done to correct the employee's deficient performance and are providing suggestions/offers of assistance for improvement.

The "Suggestions/Directives" component is typically included in a disciplinary document as illustrated in this section under *Reference A*, at page 51.

Legally sufficient documentation requires an evaluator to give:

- **Directions** on the proper conduct or level of performance expected to be followed in the future; <u>and</u>
- Suggestions or recommendations to assist employees in meeting these requirements.

REMEMBER that both suggestions **and** directions are part of the "S" component in **FRISK**<sup>TM</sup>.

#### **Directions**

Directions must be **clear and unequivocal** and include the effective **timelines** and the **consequence** if the employee fails to comply. In other words, the employee must know *what must be done* to correct the deficient performance, *when* and *what will happen* if not corrected.

## Good Language Examples

- "I expect you to refrain from using derogatory language, such as 'stupid' and 'dumb' towards your students."
- "You must be more careful in performing your job and refrain from filing records in the wrong personnel files."

#### Drafting Clear Commands

The command given to an employee to correct unsatisfactory conduct or performance must be CLEAR AND UNEQUIVOCAL.

The **test** for determining a clear and unequivocal command is that it must **not leave room for the employee's own interpretation**. A statement that implicitly gives an employee the option of not obeying is not a clear and unequivocal command.

Typically, evaluators couch directive language in vague, innocuous terms to avoid offending employees. The problem is this "tactful" approach conveys **mixed signals** which makes the direction subject to MISINTERPRETATION. This is a common defense in disciplinary cases.

Concern that straightforward direction may negatively affect the working relationship between an evaluator and employee is unfounded, provided the direction is honest, constructive, and free from personal bias.

## Bad Language Examples

- 9 "It would be better if you remained at your work station between 8:00 a.m. and 10:00 a.m."
- 9 "In the future, *I would appreciate* if you turned your goals and objectives in on time."

#### Good Language Examples

- "You are **directed** to be present at your work station from 8:00 a.m. to 10:00 a.m.."
- "In the future, I expect you to turn in your goals and objectives on time."

Additional examples of proper commands are included in this section under *Reference B*, at page 52.

#### Drafting Clear Descriptions Of Directed Conduct

The description of the conduct you are directing the employee to follow must be UNAMBIGUOUS, EASY TO UNDERSTAND, AND COMPLETE.

This is important to ensure that the employee **reasonably understands** what is expected in order to correct the deficient performance. If the direction is vague or incomplete, employees may argue that they did *not understand* and therefore should *not be held accountable for non-compliance*. This is a common defense in disciplinary cases.

Frequently, drafting clear directional language is not difficult because the conduct sought to be corrected is easy to identify. However, **abstract conduct and general performance areas**, such as workload management, employee attitude and cooperation, job efficiency, and adequate skill levels, are more difficult to describe.

The **general rule** is that the **same techniques** used in describing the "Facts" evidencing the employee's deficient performance should be used by the evaluator in identifying the conduct or performance standards expected of the employee. The language should **pinpoint** and **describe the conduct expected to be followed in complete and explicit terms**, using details and examples or samples of the employee's work to add specific factual foundation.

## Examples

- "Effective immediately, you are directed to prepare **timesheets** with more detail. You are to specify the employee name, social security number, dates of absence, reason for absence, and required signatures. I have attached a sample timesheet which contains the format I expect you to follow."
- "Effective immediately, you are to refrain from demonstrating anger and making derogatory comments toward other staff. For example, you are to avoid yelling at colleagues as you did when you raised your voice during our department meeting on September 15, 1996, and told John Sanders, Department Chair, that he was an 'idiot'"
- "Effective immediately, you are to use pesticide sprays in accordance with MDS requirements as set forth in the attached manufacturer's guidelines."
- "Effective immediately, you are expected to work with your co-workers in a cooperative manner. Specifically, you are to perform your work without using derogatory statements toward other employees such as 'you do it sucker,' and you are to complete the work within the required timelines. You are to demonstrate a sensitive and positive attitude toward the needs of others by offering to assist in completing department tasks as assigned by your immediate supervisor."

## Timelines and consequences

Directions must always contain the effective **timelines** and the **consequences** if the employee fails to comply.

The employee not only must know what should be done to correct the deficient performance, but when (i.e., timelines) and what will happen if not corrected (i.e., consequences).

### **REFERENCE B**

#### CLEAR COMMANDS vs. VAGUE COMMANDS

Based on the test for clear and unequivocal commands at page 41, determine which of the following phrases are clear or vague.

	<u>CLEAR</u>	<u>VAGUE</u>
1. Would you mind responding by		
2. Please do the following by Friday		
3. I insist that you		
4. I would appreciate it if		
5. Perhaps you should		
6. You are directed		
7. I expect the following by		
8. You are required to		
9. You may wish to		
10. The report is due by		
11. It would be helpful if you would		
12. Regulations required that you		
13. I insist you consider the following		
14. Have your students do the following		
15. It is important that you		
16. Why don't you		
17. Return the following to me by		
18. A satisfactory evaluation will require		
19. I can see no reason why you should not be prepared to		
20. I encourage you to avoid coming in late		

**ANSWERS:** The clear and unequivocal commands are in phrases 2, 3, 6, 7, 8, 10, 12, 14 and 17



# KNOWLEDGE

#### "DOES THE EMPLOYEE HAVE KNOWLEDGE OF THE DOCUMENT PRIOR TO PLACEMENT IN THE PERSONNEL FILE?"

You have previously told the employee what happened and what should have happened - you have connected the employee's conduct to the job and have identified what must be done to correct the deficient performance and provided suggestions for improvement. Now you are notifying the employee of the personnel file rights under Education Code Section 87031 and applicable collective bargaining agreement provisions.

The "Knowledge" component is typically included in a disciplinary document as illustrated in this section under *Reference A*, at page 64.

Section 87031 requires a district to give an employee notice and an opportunity to review and respond to any document containing derogatory information **prior** to its placement in the employee's personnel file. This knowledge requirement is important since any derogatory documentation placed in the employee's personnel file without prior notice is arguably defective and not admissible as evidence in a disciplinary hearing.

There is no specific amount of time that an employee must be given to review and respond to a derogatory document under Sections 44031 and 87031. Normally, the time is regulated by labor contract provisions which require between 5 and 10 calendar days.

To ensure that employees have knowledge of documents containing derogatory information **prior** to their placement in a personnel file, the following sample provision should be included:

A copy of this letter will be placed in your personnel file after \_\_\_\_ days. You may prepare a response and have that response attached to this document.

## **Including Documents In Personnel Files**

As a general rule, any document which could **serve as a basis for affecting employment status** (i.e., could lead to an adverse personnel action) should be provided to the employee and PLACED IN THE EMPLOYEE'S PERSONNEL FILE within a reasonable period of time after recognizing and validating the performance problem, subject to the right to respond under Education Code Section 87031.

The determination of whether a performance problem reflected in documentation could serve as a basis for affecting employment status is not dictated by any fixed objective standard. It is based on a **reasonable determination** by the evaluator that the employee's deficient conduct, **if repeated, could lead to an adverse personnel action**. Because documentation included in a personnel file normally constitutes management's primary evidence in discipline cases, when in doubt, it is recommended that the evaluator place the document in the personnel file, rather than in a site working file.

If the evaluator does not reasonably believe that the employee's conduct could lead to an adverse personnel action, any document issued concerning this conduct typically is placed in the evaluator's site file pending the evaluator's continued review of the employee's performance. This is the so-called "VALIDATION PERIOD" which is the time used by an evaluator to **monitor and assess** an employee's performance problem.

During the validation period, the evaluator should work with the affected employee applying progressive corrective methods to effect positive change in performance, such as conferencing, issuing post-conference memoranda and warning letters, and implementing available remediation/assistance plans.

If during the validation period the evaluator determines that the employee's conduct could serve as a basis for affecting employment status (i.e., could lead to an adverse personnel action), the document should be placed in the employee's **personnel file**. THIS WOULD INCLUDE ANY OTHER MATERIALS IN THE SITE FILE RELATED TO THE SAME PERFORMANCE PROBLEM. All these documents would be subject to prior notification and right to respond as required under Section 87031 and applicable provisions of the collective bargaining agreement.

#### PROGRESSIVE DISCIPLINE

The **type of document selected** by an evaluator to record unsatisfactory employee performance is determined by the **progressive discipline process**.

The progressive discipline process consists of a series of disciplinary steps, each step calling for more serious disciplinary action. The process generally includes the following sequence:

- ↓ Oral Warning/Conference
- ↓ Written Warning
- ↓ Letter of Reprimand
- ↓ Unsatisfactory Evaluation
- ↓ Suspension Without Pay
- ↓ Dismissal

These progressive discipline steps serve as a GUIDE for the evaluator in selecting the appropriate document used to record deficient performance.

As a **general rule**, an evaluator should start with the first step of progressive discipline and proceed to the next step each time the employee repeats the same unsatisfactory conduct. For example, if an employee previously received an oral warning and written warning for failing to comply with administrative directives, the next progressive discipline step would be a letter of reprimand.

The basic goal of progressive discipline is to CORRECT unsatisfactory employee performance. In most cases, effective use of this process will correct employee deficiencies prior to dismissal. However, where the employee's performance is not corrected, documentation based on progressive discipline is important to substantiate management's burden of proof in disciplinary proceedings.

Progressive discipline documentation is useful because it:

- Serves to inform employees of unacceptable behavior.
- Demonstrates a good faith effort by the district to help correct unacceptable behavior by first imposing lesser discipline.
- Justifies more serious penalties since the district can establish that prior less serious discipline was not effective.
- Helps establish a **pattern of deficient performance** which demonstrates that the employee's conduct is likely to recur.

## **Skipping Progressive Discipline Steps**

Progressive discipline steps may be SKIPPED based on the **severity of the employee's conduct**, subject to any limitations in labor contract provisions or district policies. For example, an evaluator may elect to advance to a letter of reprimand where the employee's conduct is serious, such as in cases involving gross insubordination, carelessness in the performance of duty, or threatening other employees.

- ↓ Letter of reprimand
- ↓ Suspension without pay
- ↓ Dismissal

## **Repeating Progressive Discipline Steps**

Progressive discipline steps may be REPEATED where the cause for disciplinary action requires **persistent violation of a rule**, or where the evaluator wants to establish a **pattern** of deficient performance. For example, an evaluator may elect to repeat various progressive discipline steps in cases involving persistent refusal to follow district policies or administrative procedures, or to demonstrate a pattern of

deficient performance to support dismissal based on incompetency, job inefficiency, or evident unfitness for service.

- ↓ Oral warning/conference
- **↓** Oral warning/conference
- ↓ Written warning
- ↓ Letter of reprimand
- **↓** Letter of reprimand
- **↓** Letter of reprimand
- ↓ Suspension without pay
- ↓ Dismissal

The likelihood that an employee's unsatisfactory conduct will **recur** is an important consideration in most dismissal cases not involving serious infractions. This can be established by showing that the employee **continued** the deficient conduct despite the efforts of the evaluator, who attempted to correct the employee's performance by repeating progressive discipline steps.

When the progressive discipline process is altered, however, it is important that the same steps be **uniformly applied** to other employees in similar cases to AVOID CLAIMS OF DISPARATE TREATMENT.

To avoid claims of disparate treatment, some employers have adopted **uniform progressive discipline plans** tied to common infractions by employees. Examples of this approach are included in this section under **Reference A**, at page 72-73.

## **Progressive Discipline Step Selection**

In determining what progressive discipline step to select, an evaluator **first** should apply the normal progressive discipline sequence, which begins with an oral warning. Any **variation** in this sequence should be based on the following factors:

- Limitations expressed in collective bargaining agreement provisions, district policies and administrative procedures.
- Degree of seriousness of the employee misconduct.
- Past similar conduct.
- Likelihood that the employee's misconduct may have adversely affected other people, including faculty, staff and students.
- Extenuating or aggravating circumstances surrounding the conduct.
- Praiseworthiness or blameworthiness of the employee's motives resulting in the conduct.
- Need to establish a pattern of deficient conduct to support persistent refusal to follow district policies and administrative procedures or to validate reoccurring unsatisfactory conduct.
- Reasonable relationship between the degree of disciplinary action and the seriousness and nature of the offense.
- Uniformity in application to other employees in similar circumstances.
- Policies and practices of the Human Resources Office.

As a **general rule**, when evaluators are uncertain as to which progressive discipline step to apply, they should confer with the Human Resources Office for advice.

## **CONFERENCE SUMMARY TEMPLATE**

	TO:	[Name of Employee]
	FROM:	[Name of Evaluator/Title]
	DATE:	
	SUBJECT:	Conference Summary Performance Report
		summarize our conference of <u>[date]</u> concerning Present at this meeting were
F	During the co	onference, the following conduct was discussed:
R		our conduct as it relates to the following rule(s) [directive(s), labor rision(s), expectation(s)]:
I		ou that your conduct negatively impacted the
S	assistance, t	conference, I provided you with the following directive(s) and to take effect:
		ed you that your failure to comply with any of the above directives
K		is letter will be placed in your personnel file after days. You a response which will be attached to this document.

#### COMPLETED CONFERENCE SUMMARY SAMPLE

TO: Betty Snow

FROM: Jane Rogers, Director of Special Projects

DATE: March 3, 2012

SUBJECT: Conference Summary Performance Report

*This is to summarize our conference of* March 2, 2012, *concerning* my review of the correspondence you prepared for my signature. *Present at this meeting* was Carl Jones, Associate Director.

**F** During the conference, the following conduct was discussed:

The letter you typed for Dr. Smith contained the following spelling errors: "callendar" and "priviledge."

R I reviewed your conduct as it relates to the following directive:

On February 2, 2012, I issued a memorandum to you directing you to be more careful in correctly spelling words in all correspondence that you prepare.

- I informed you that your conduct negatively impacted the efficient operation of the Special Projects Program inasmuch as your poor spelling reflects poorly on our department.
- S During the conference, I provided you with the following directives and assistance, to take effect immediately:

You are expected to be more careful in spelling words in all office correspondence and when in doubt check the correct spelling in your dictionary. I offered to provide you with a classroom dictionary from our resource library.

I also informed you that your failure to comply with the above directive will result in the issuance of a formal letter of reprimand.

A copy of this letter will be placed in your personnel file after 10 days. You may prepare a response which will be attached to this document.