**Performance Improvement Plan (PIP)**

**Employee Details**

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| --- | --- | --- | --- |
| **Name of Employee:** | Click to enter text | **Department:** | Click to Select |
| **Job Title:** | Click to enter text | **Name of Manager:** | Click to enter text |

**Performance Review Details**

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| --- | --- | --- | --- | --- | --- |
| **Capability Stage:** | Click to Select | **Date of Meeting:** | Click to Select Date | **Review Date 1:** | Click to Select Date |
| **Review Date 2:** | Click to Select Date | **Review Date 3:** | Click to Select Date | **Review Date 4:** | Click to Select Date |
| **Review Date 5:** | Click to Select Date | **Review Date 6:** | Click to Select Date | **Review Date 7:** | Click to Select Date |
| **Review Date 8:** | Click to Select Date | **Review Date 9:** | Click to Select Date | **Final Meeting Date:** | Click to Select Date |

**Details of Objectives**

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| --- | --- | --- | --- | --- |
| **Improvement Objective** | **Success Criteria** | **Additional Support Needed** | **Target Completion Date** | **Review Schedule** |
|  |  |  | Select Date … |  |
|  |  |  | Select Date … |  |
|  |  |  | Select Date … |  |
|  |  |  | Select Date … |  |
|  |  |  | Select Date … |  |
|  |  |  | Select Date … |  |

**Guidance on Completing this Form**

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| **Employee Details**  Click in the boxes to input text. The boxes do not have a character limit. For ‘Department’, click in the box and select from the drop-down menu.  **Performance Review Details**   1. Capability Stage - click in the box and select from the drop-down menu. You have three options – Stage 1 Informal, Stage 2 Formal and Stage 3 Final. In most cases your PiP will be created after an informal meeting and there will not be any need for formal action. However, should a Stage 2 or Stage 3 meeting be needed, an updated PiP should be created to confirm the objectives agreed at these meetings. They may be the same objectives as detailed following a Stage 1 meeting, but the PiP should reflect the stage of capability it relates to. 2. Date of Meeting - click in the box and select the meeting date from the calendar provided in the drop-down menu. 3. Review Dates – nine review date boxes have been provided although you may not need all of them. Review meeting dates should be booked with the staff member in your Outlook calendar. You can then record the dates of these meetings on this form. 4. Final Meeting Date – This meeting should be the same as the target completion date. If targets have been given different completion dates, the Final Meeting Date should be the same as the completion date for the target with the longest completion period. The Final Meeting Date should be recorded even if you haven’t needed all of the review dates.   **Example Details of Objectives**  It is important that employees are supported to succeed. You must ensure that the member of staff understands the standard(s) they have to achieve and what support they can expect to receive. Therefore, you must describe the requirement clearly and concisely. The examples in the table below have been given to illustrate a task-based target (step ladder register and inspections) and a quality standard target (management reports) and the support that can be given to enable the employee to understand and meet the target.  **Details of Objectives**  Six target boxes have been provided although you may not need all of them. Refer to the examples if you are not sure how you should complete each box. The boxes do not have a character limit. Select the target completion date from the calendar provided in the drop-down menu for each target you set.  **NB. Use the** [PiP Record of Review Meetings](https://www.essex.ac.uk/staff/uecs-and-wivenhoe-house-staff/uecs-staff) **for each review meeting you have with your member of staff.**  **Continued …**  **Formal Stages**  If the employee does not meet the required standard and you move to stage 2 of the procedure, you should complete a new PiP. A third new PiP will be required if final stage proceedings are reached. Make sure you select the correct stage from the drop-down menu when you complete the new PiP. The objectives may be the same, or they may have been amended during the review period. The new PiP should detail the up-to-date objectives. The original PiP and the records of review meetings will provide confirmation of the employee’s progress at each stage of the procedure. |

**Guidance on Completing this Form - Example Details of Objectives**

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| **Improvement Objective** | **Success Criteria** | **Additional Support Needed** | **Completion Date** | **Review Schedule** |
| What, specifically, must the individual do to improve their performance to meet expected standards | How will you know that the expected standards have been met? | What support does the individual need to meet the standards, for example regular manager coaching, training | Date the objective must be achieved | When will progress be reviewed and by whom? |
| e.g., Stepladder register and annual inspections are up to date | e.g., Inspections have taken place, documentation is complete, and all data is correct | e.g., Familiarisation with work equipment safety information relating to stepladders [Work equipment safety | University of Essex](https://www.essex.ac.uk/staff/equipment-safety/work-equipment-safety) | The final date for satisfactory completion of objective | e.g., progress assessed in weekly meetings with manager |
| e.g., Management reports produced monthly which provide relevant, accurate sales information to aid decision making | e.g., Management reports are produced monthly. Sales of different products shown. Based on product popularity, effective and timely decisions can be made by management team | e.g., Template report will be provided. Coaching. Attendance at management team meetings where report contents will be reviewed and discussed. | The final date for satisfactory completion of objective | e.g., progress assessed in monthly management team meetings and feedback given |