



# **Performance Partnership Program (PPP) Performance Improvement Discussion (PID) Procedures**

A Performance Improvement Discussion (PID) is a structured discussion between a supervisor and an employee regarding the need to improve performance. A PID can occur at any time, including during a period when an employee is under formal corrective action. Although a PID is an informal, non-disciplinary discussion, it is formally documented in a written memo. In addition, it requires specific pre- and post-discussion documentation by supervisors. Employees who are represented by unions are entitled to have a representative present during a PID.

## **PPP Documents Needed: (*Contact Labor and Employee Relations for access to documents*)**

Pre-Meeting Checklist Template

Post-Meeting Checklist Template

Performance Improvement Discussion Memo Template

Steps of a Performance Improvement Discussion

## ***Preparing for the Performance Improvement Discussion (PID):***

1. Conduct a thorough investigation of the situation or incident to make sure your facts are correct.
2. Review any notes of previous coaching sessions or informal discussions held with the employee about the issue.
3. Complete the pre-meeting checklist.

## ***Planning the PID meeting:***

1. Determine a suitable location for the meeting such as the supervisor's office or another secluded area.
2. Determine how the employee will be notified of the meeting. Advance notice is not required. Supervisors may call the employee in to meet immediately. Optionally, supervisors may schedule the meeting in advance and notify the employee of the meeting details (date, time, location, etc.).

## ***Conducting the PID meeting:***

Have the pre-meeting checklist and Steps of a PID readily available. Using the pre-meeting checklist, follow the steps of the PID meeting guidelines closely.

## **Steps of the PID Meeting:**

1. Greet the employee. Inform him/her that the meeting is a Performance Improvement Discussion.  
**NOTE:** If the employee requests a union representative, immediately end the meeting and reschedule to allow for a representative.

2. State the *Actual Performance* AND THEN state the *Desired Performance* (I have a problem and I need your help).
3. Allow the employee an opportunity to respond (What can you tell me about this?).
4. Bring up any previous discussions about the problem AND tell the employee the specific change in performance you expect.
5. Ask for an agreement/commitment – If the employee agrees/commits, go to step #8 and end the meeting on a positive note (see below).
6. State the *Impact* – the good business reasons why the problem must be solved.
7. Ask for an agreement/commitment – If the employee agrees/commits go to step #8 and end the meeting on a positive note (see below).
8. State the *Consequences* – the logical consequences the individual will face if he/she fails to correct the situation.
9. Ask for agreement/commitment.
10. If the employee has not given an agreement/commitment you must mandate compliance and reiterate the *Consequences*. (This step should happen rarely, if ever).
11. Inform the employee of the [Faculty Staff Assistance & Well Being Services](#).

**Following the meeting:**

1. Complete the post-meeting checklist and the PID memo template.
  - The employee and union representative(s) should be given a copy of the memo only (not the pre- and post-meeting checklists). A copy of the union contact list is in the PPP Box Folder.
  - Please forward an entire set of documents (Pre and Post Meeting Checklists, PID Memo) to Labor and Employee Relations. The PID documents will *not* be placed in the employee's official personnel file.
2. Follow up within a reasonable amount of time to make sure that the problem has been corrected.
3. Reinforce performance improvement.

**Additional Information**

For PPP templates or more information regarding Performance Improvement Discussions and the Performance Partnership Program, contact Labor and Employee Relations for access:

Labor and Employee Relations

[lhr-ler@illinois.edu](mailto:lhr-ler@illinois.edu)

217-333-3105

Additional Resources:

HR Series: Performance Partnership Program

*Last Modified: September 22, 2023*