Poor Performance Improvement & Review Planner

1 / Define the gap and agree the practical plan

A working planner for performance support and review, particularly after probation. Adapt it to the role, circumstances and applicable procedure. A PIP is not a punishment or a prescribed statutory form; it does not make dismissal automatic.

Employee / role: _____ Manager: _____

Plan begins: _____ Reviews: _____ Proposed end: _____

A. Establish the baseline

Required standard and how it was communicated / understood:

Actual performance: dated examples, reliable measures and any disputed evidence:

Employee explanation, possible causes, barriers and any health/accommodation issue:

B. Set a realistic improvement goal

Priority work area / required improvement / measurement method:

Why the goal is reasonably achievable and the chosen period is reasonable:

Do not assume a fixed 30-, 60- or 90-day period is legally required or sufficient. Distinguish inability from alleged negligence or deliberate non-compliance. Check a different route where the evidence requires it.

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2 / Provide support and keep a fair review record

C. Support commitments

Specify what will be provided, by whom and when. Record delivery or delay. Use additional sheets for further goals or reviews.

Training / coaching / resources / adjustment	Provider / date	Delivered / shortfall / action

D. Review meeting

Review date: _____ Period assessed: _____ Participants: _____

Results against the stated goal, with evidence references:

Employee comments, disputed information and explanation of remaining gaps:

Support actually provided; obstacles; any revised goal or additional support:

Next action / responsible person / next review date:

Provide timely, useful feedback. Keep the review open to correction and new information. Do not treat a missed target as proof of culpability or as an automatic dismissal trigger.

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3 / Evaluate progress and decide what happens next

E. End-of-plan assessment

Assessment date: _____ Evidence period: _____ Reviewer: _____

Goal achieved / partly achieved / not achieved / uncertain - evidence and reasons:

Employee response and how it has been considered:

Further support, adjusted work or other reasonable alternatives assessed:

F. Reasoned next step

[ ] Close plan and continue ordinary management
[ ] Continue or revise support with reasons and a reasonable review period
[ ] Obtain further information / reassess the appropriate process
[ ] Refer for a further fair incapacity process; no outcome predetermined

Selected step, reasons, owner, target and information to be provided to the employee:

Explain relevant possible consequences, including possible dismissal where appropriate. Give a fair opportunity to respond before a decision. An internal process need not invariably take a courtroom-style hearing format.

Employee acknowledgement of receipt, if given: _____ Date: _____
Manager: _____ Date: _____
Receipt is not agreement. Record objections or inability to sign separately.

Source: Preparing for Incapacity Enquiries, Chapter 2 and Templates 7-11; 2025 Code of Good Practice: Dismissal, items 19-20.

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The complete professional publication

Preparing for Incapacity Enquiries: A Practical Guide to Managing Performance, Ill Health and Other Forms of Incapacity — Philip Maré

The complete publication contains the full practical framework, worked examples and 31 adaptable templates.