Instructions: HACAP Employee Coaching Form

1. This form is to guide you in the development of a written document for formal employee coaching.
   The structure (layout) of this form is a suggested framework and does not need to be followed exactly;
   however, all highlighted topic areas below must be addressed in the coaching plan to ensure consistency and completeness
2. Written Employee Coaching should be done in a 1-on-1 conversation with employees. Tell the employee this is a formal coaching meeting.
3. If behavior or performance does not improve after 1-on-1 coaching with an employee, this is used as pre-disciplinary documentation.
4. Supervisors can adapt their layout/format to best fit the situation or their coaching style
5. Please **ensure that your coaching documentation clearly reflects each of the highlighted topic areas**, even if they are incorporated in a different format or order.
6. Best practice is to coach on one area of concern at a time; therefore, if the coaching leads to disciplinary action, there is no ambiguity regarding the behavior or performance that will be addressed in the disciplinary acti

HACAP EMPLOYEE COACHING FORM

Employee Information:

- Employee Name
- Job Title
- Supervisor
- Program
- Site
- Date of Coaching

Purpose of coaching (include all that apply)

- Performance Improvement
- Policy/Procedure Clarification
- Attendance/Punctuality
- Conduct/Behavior
- Other: _____

Summary of Concern

- Give a clear and factual description of the issue. Include dates and examples (if appropriate). Stick with the facts and do not include your (or others) opinions or assumptions.

Expectations Moving Forward

- Describe expected performance or behavior and timeline to accomplish it.
- Be specific about what the improvement will look like

Summary

- Outline the key points you discussed
  Was feedback provided?
  Did you clarify a protocol, expectation, policy, etc.
  Are you providing any additional resources or training?

Follow Up Required

- If a follow-up meeting is needed, set the date and time and record it on your coaching form.
- If a follow-up meeting is not required or scheduled, record that on your coaching form

Behavior/Performance that Doesn't Improve

*** Include the exact phrase below on your coaching form***
Failure to demonstrate sustained improvement may result in formal disciplinary action

Employee Acknowledgement

*** Include the exact phrase below on your coaching form:
By signing below, the employee acknowledges that the information in this written formal coaching has been reviewed with them. Their signature does not necessarily indicate agreement with the contents but confirms receipt and understanding of the items discussed in this formal coaching.

- Create a spot for the supervisor and the employee to sign and date the coaching form.

Original: Supervisor Keeps
Copy: Employee