

WHEN PERSONAL PROBLEMS = PERSONNEL PROBLEMS...DOCUMENT IT!

QUESTION:

I am a supervisor in a small manufacturing company. We have over 50 employees who work on the manufacturing line, and usually all of our employees stay focused and on task. This is important because any hiccup in the operations sets us back half an hour or longer while we reset all the machines.

We have one employee, however, who is slowly becoming more and more of a problem. Her name is Pam, and she's always been somewhat of a talker, visiting occasionally with the other employees while they're all working the line. Recently, though, Pam is experiencing problems in her personal life and is apparently having a difficult time keeping the details to herself -- at least while she's at work.

According to employee reports, Pam talks constantly, and has even had a loud confrontation with an employee who - in response to Pam's orating - suggested to Pam that she "get over herself." Unfortunately, Pam's disruptive behavior has caused several delays in the production line over the last few weeks.

I want to make sure I keep track of Pam's actions in case I need to meet with her to address her unacceptable behavior, but I'm hesitant to write anything down because I'm afraid I'll miss something or won't do it very well. Should I document the events in writing?

ANSWER: You should definitely document the incidents in writing. If you decide to discipline Pam with, for

example, a written warning, you will need to have an accurate account of the facts related to the behavior that is unsatisfactory.

Documentation of personnel matters is often one of managers' least favorite activities, but it is critical for a number of reasons.

Contemporaneous feedback - particularly when the feedback addresses negative behavior - is essential to maintain or improve employee performance. Employees must be aware that they need to improve performance before a fair supervisor should expect change.

Problems arise when supervisors put off discussing performance issues with an employee and allow the poor performance issues to accumulate before doing so. Providing employees with timely and objective descriptions of unsatisfactory performance keeps them aware and informed of any work performance issues.

Also, documenting incidents as they occur helps supervisors recall necessary details of significant discussions with employees, like scheduling issues, grievances and other complaints, discussions about company policies, and personnel actions. The more time that passes following such discussions, the fewer details will be remembered.

When should a supervisor document incidents in writing? After meeting with an employee for work-related reasons; after disciplining an employee or taking other personnel actions; after discussing or clarifying policies or procedures for an employee; after responding to employee grievances; after conducting personnel investigations, and any time other significant events or discussions occur.

Supervisors should document employee behavior in as neutral and objective fashion as possible. It is very

important to document only facts -- not rumors or gossip -- and to document the event as soon as possible so the details are still fresh.

Documentation should be written in specific language, not general conclusory statements. For example, if an employee uses expletives or threatens someone in the workplace, documentation of the incident should include direct quotes of the employee's statements ("Jimmy said 'Take this job and shove it where the sun don't shine!' ") instead of the supervisor's opinions based on the employee's statements ("Jimmy was rude and uncompromising.")

Finally, your concern that you won't do a perfect job with the written documentation of the incidents involving Pam is a common one among managers. Nevertheless, if you persevere (and practice!) you will gain the confidence necessary to do a fair and thorough job of it.

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