

SAN BERNARDINO MUNICIPAL WATER DEPARTMENT

POLICIES & PROCEDURES MANUAL

POLICY 31.080 - EMPLOYEE CONSULTATION

Date: February 11, 2020
Revision No.: 2
Supersedes: August 2008
First Adopted: September 16, 1991

POLICY:

The Employee Consultation Report assists management and supervisory personnel in discussing individual work performance issues including but, not limited to, violation of rules and/or policies.

PROCEDURE:

The form should include an outline of steps to be taken for correction of the work performance issue(s). It is intended as a constructive tool to deal with performance issues in a standardized format to highlight areas of job performance where improvement is needed.

For purposes of clarity and uniformity in its use, a brief explanation may assist in establishing standard utilization of the form (attached).

Under "SUBJECT OF REPORT", the supervisor is asked to check one or more of the appropriate boxes. If the situation is not otherwise identified by the boxes, please mark the "other" box and explain.

Where the "DESCRIPTION OF INCIDENT" is requested, make sure information such as date, time and place or other meaningful facts are included in the account. If necessary, attach a separate sheet of paper.

Under "ACTION TAKEN", indicate by checking one or more of the appropriate boxes, the disposition of the consultation. A brief explanation should set forth any pertinent information:

- A. If a verbal warning is given, please retain this report in the Division. In this case, a copy will not be placed in the employee's Personnel File unless subsequent action is necessary.
- B. All other actions taken will result in a copy being placed in the employee's Personnel File.
- C. If disciplinary action is recommended, check this box.

If the consultation is conducted in the presence of other persons, note this information under "THIS CONSULTATION WAS CONDUCTED WITH".

If the employee refuses to sign acknowledgement of receipt of the report, please note on the signature line "refused to sign." An employee's refusal to sign does not preclude the report from being placed in the Personnel File if appropriate.

The Supervisor should describe the length of time spent handling the consultation, by noting hours and minutes involved.

Upon completion of the form, together with any accompanying documentation, the "DISTRIBUTION" must be followed. The employee must receive his/her copy of the report the same day.

Policy Review

Established:	<u>9/16/1991</u>
Revised:	<u>8/2008</u>
No changes:	<u>7/2018</u>
No changes:	<u>7/2019</u>
Revision Board Approved:	<u>2/11/20</u>
No changes	<u>7/2021</u>

City of San Bernardino Municipal Water Department
EMPLOYEE CONSULTATION REPORT

Employee _____ Job Title _____

Date _____ Time: _____ Department _____

Subject of Report: Rule or Policy Infraction Other
 Safety Violation

Description of Incident: (Include Date, Time, Etc.)

Action Taken:

(Explain)

- Verbal warning given
- Written warning given
- Disciplinary action recommended

(Attach additional sheets as needed.)

This Consultation was conducted with:

Employee Only Employee Representative Representative's Name: _____

Others present (if any): _____

Comments/Action Plan:

Supervisor's Name/Title _____ **Signature** _____

Duration of Consultation: Hours Minutes

I hereby acknowledge receipt of a true copy of this report.

Employee Signature _____ Date _____

Employee Comments _____

Reviewed for Filing (Initials)	
_____	Sup.
_____	Div. Dir.
_____	Rep.
_____	Gen. Mgr.
_____	Pers. File