



Performance Improvement Plan Guide & Checklist

Use this guide to help you navigate performance issues with staff members on your team. The goal is for staff to have clearly defined expectations and wins, the tools, and training they need to do the job well, and accountability and coaching for missed expectations.

Check off each step if a performance issue continues to occur. Provide all notes and details in the yellow folder activity log. Work in collaboration with your Campus Pastor and Core Director.

Training Resource: [Craig Groeschel Leadership Podcast](#)

- **STEP 1:** Meet to reset expectations with your team member and confirm his or her understanding. Recap the conversation by documenting it in 15Five or by sending a follow up email.
- **STEP 2:** Provide additional training, coaching, and/or job shadowing opportunities.

If the issue coached previously occurs again:

- **STEP 3:** Review the issue with the team member and refer to the previous conversation(s).
- **STEP 4:** Connect with HR to put together a “yellow folder” that includes a 30 - 90 day performance improvement plan.
- **STEP 5:** Share the team member’s performance challenges with your SLT leader. Also share with Pastors Todd & Julie if the team member is a pastor, director, or a front face of ministry. Include tools, coaching, and training you provided to help your team member succeed. Also include your perspective on if there is another role he or she would be better suited for.
- **STEP 6:** Meet with your team member and HR to review and sign the performance improvement plan (see separate guide for how to lead this meeting).
- **STEP 7:** Track progress weekly or biweekly with your team member through 15Five check-ins and one-on-one meetings. Also record progress updates on the event log in the yellow folder.

If performance standards are not met:

- **STEP 8:** Share an update with HR, your SLT leader, and Pastors Todd & Julie. Provide this checklist and yellow folder documentation to show the actions taken. Confirm agreement to release the team member from the role.
- **STEP 9:** Meet with the team member and HR to release the team member from the role. Discuss other CF options if applicable.