**Corrective Action Form**

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\**PivotHR Solutions sample policies serve for illustrative purposes only and do not represent legal or tax advice. Should your ministry have legal or tax questions, please see an attorney to discuss your specific context.*

**Instructions**

The *Corrective Action Form* is utilized for ministry staff members who find themselves in need of remedial attention. While maintaining a spirit of grace tempered with accountability (2 Corinthians 5:10), the form should be implemented when a known workplace issue must be addressed and resolved.

Staff possessing performance struggles, minor policy or process violations, or conduct or attitude issues receive the form in progressive escalation. For gross misconduct violations requiring remedial action up to and including staff dismissal, progressive escalation *may or may not* be required dependent upon biblical guidelines, clarity of ministry policies, prior precedence of similar situations, and/or the context of the situation.

**Corrective Action Level**

*Verbal Warning/ Counseling*:

* The first official notice in the corrective action process. Complete the form in its entirety with specificity and allow the staff member to provide feedback, if desired.
* Review the document with the staff member in-person.
* The form does not have to be signed by the staff member; the document should be placed in the staff member’s personnel file if further remedial action is needed.

*Formal Written Reprimand*:

* The second official notice in the corrective action process. Complete the form in its entirety with specificity again and adjust the “*Remedial Action Taken*”, “*Further Action if Not Corrected*” and “*Review and Follow-up Time Frame*” sections.
* Review the document with the staff member in-person.
* The form must be signed and placed in the staff member’s personnel file.

*Suspension*:

* Complete the form should staff member receive suspension before dismissal.
* Discuss the suspension in-person with the staff member.
* Designate the time off work and pay framework.
* The form must be signed and placed in the staff member’s personnel file.

**Best Practices for Ministry Leaders**

Before Meeting:

* If possible, speak to the staff member about the issue *before* utilizing the *Corrective Action Form*. If the issue doesn’t resolve itself over a specified period of time, enact the form (the form should not be the first time the staff member hears of the concern).
* Before implementing the *Corrective Action Form*, ensure the situation has received prayer and the context of the situation requires such action.
* Ensure the issue is not protected by labor law – age, race, color, gender, national origin, citizenship status, physical or mental disability, veteran status, genetic information, and/or protected family or medical leave.
* If emotionally charged before the meeting, wait. (Proverbs 14:17)

Meeting Proper:

* Begin with prayer (Philippians 4:6).
* Bear the fruit of the Spirit at all times (Galatians 5:22-23).
* Be gracious during the meeting; mercy triumphs over judgment (James 2:13).
* Implement towards the end of the day; allow staff members to sort their emotions at home rather than the ministry workplace.
* Refuse to debate the issue; if needed, ask the staff member to allow you to finish. Provide time towards the end of the meeting for them to express their concerns.
* Be aware of using the words, “always” and “never”.
* Listen. Some things stated by the staff member simply need no response.
* If appropriate, ask the staff member if you can pray for he or she as the meeting ends.
* Document. Once the meeting has ended, document the facts – what the staff member stated as well as their concerns. Also document your statements and any rebuttals you may have given. Keep these on file.
* *Remember:* If you are angry, cutting, defensive, negative, harsh or legalistic, you will undermine the corrective action process. And, the employee will have good reason to complain of your own actions.

After Meeting:

* Follow-up with staff member in gentleness and humility (Galatians 6:1; 1 Peter 5:6).
* Ask if there is anything that can be clarified further from the meeting.
* Reaffirm your desire for them to succeed and be fruitful in the role they are in with the ministry.
* Practice understanding, patience and allow the staff member to process the meeting in a safe environment (Colossians 3:12).
* Document your meeting with the staff member and keep on file.

**Corrective Action Form**

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**Staff Information**

|  |  |
| --- | --- |
| Staff Member Name |  |
| Position  |  |
| Department  |  |
| Supervisor  |  |
| Corrective Action Date |  |
| Person Enacting Form |  |

**Corrective Action Level**

 Verbal Warning Formal Written Reprimand Suspension

**Statement of Expectations** (i.e., job description, code of conduct expectations, etc.)

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**Statement of Issues or Concerns**

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**Remedial Action Taken**

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**Further Action if Not Corrected**

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**Review and Follow-up Time Frames**

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**Staff Member Comments**

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*\*Staff member signature acknowledges the Corrective Action Form has been received and discussed; it does not necessarily mean the staff member agrees with its content.*

|  |  |
| --- | --- |
| **Signatures** | **Date** |
| *Staff member:* |  |
| *Supervisor:*  |  |
| *Senior Pastor, Elder, or Human Resources:*  |  |