**You will need to ensure you REMOVE any paragraphs, wording or highlighted sections that aren’t relevant. If you need help on how to use the template letter please refer to the How to complete a Template Letter document on People First.**

[Letterhead Details]

**Strictly Private & Confidential**

***Addressee***

***Address 1***

***Address 2***

***Address 3***

***Address 4***

***Address 5***

***Ref: [Sender’s Initials]/[Employee’s Initials]/[Number]***

***[Date]***

***Dear [Employee Title, Employee Surname],***

**Re: Capability Formal Review Meeting - Invite**

We have met on several occasions to discuss my concerns over your performance in your role. We have confirmed that your PDPR is up-to-date and we have reviewed any objectives that relate to the areas I have concerns about. We have also discussed and confirmed that any training (including mandatory) which relate to the areas of your performance I have concerns over are up-to-date. In addition, we have discussed any other issues you feel may be affecting your work.

We agreed ***[Enter any changes or extra training incorporated to support employee to date e.g. flexible working, restricted duties, training, shadowing etc and dates of changes/training]***. Unfortunately, you have still not been able to achieve the standards required for your role in the areas discussed. I am, therefore, writing to invite you to a formal capability review meeting, where we can discuss your current performance and agree what further support we can offer to help you achieve the performance levels required.

Our meeting will be held on ***[Date]*** at ***[Time]*** at ***[Location].***

Attending our meeting will be ***[Name, Job Title]*** and ***[Name, Job Title].***

Our meeting will be held under the Capability Policy; a copy is enclosed.

You have the right to be accompanied or represented at this meeting by a Trade Union representative or work colleague, not acting in a legal capacity. It is your responsibility to organise this. If you are bringing a representative, please call/email me prior to the meeting to confirm who your representative will be (contact details below).

During our meeting we will discuss the continuing concerns I have around your performance with specific examples so you can clearly see the areas of concern. \*I have enclosed some related documents we will discuss at the meeting. \*(Delete as appropriate) You will be able to discuss any ongoing concerns you may have and any reasons that you feel might be affecting your performance. If there is any documentation concerning your performance which you would like to discuss during the meeting, please can you ensure copies of these are provided to me before ***[date]*** by either emailing them to me at ***[email address]*** or posting/hand delivering them to me at ***[address location]***.

We will also be discussing and agreeing a suitable action plan to support you. I have enclosed a copy of a blank template for you to consider what support you may need to help through this process.

To ensure there is no unnecessary delay in holding the meeting I would encourage you to make every effort to be able to attend on the date and time outlined above. If, however, you are unable to attend this meeting, please speak with me before ***[date]*** so that I can consider the reasons and find a suitable alternative date. You can call me on ***[contact number]*** or if you have to leave a voicemail message please also email me at ***[email address].***

I hope that this meeting will ensure that we can work together to support you in recognising and achieving the performance levels required for your role. In the meantime, if you have any questions, in advance of the meeting please do not hesitate to contact me.

All details of this process under the Capability Policy should remain confidential and discussed only between those parties directly involved in the process. Contents of correspondence and case details should not be disclosed to other parties with the exception of your trade union representative. This requirement for confidentiality applies verbally, electronically, to use of social media and sharing hard copy content.

***Yours sincerely,***

***[Enter Name]***

***[Enter Job Title]***

cc: ***[Enter relevant details]***

Encl. Capability Policy; ***[Enter relevant details]***