**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: Outcome of Capability Formal Review Meeting**

I am writing to confirm the outcome of our Capability Formal Review Meeting. Our meeting was held to discuss ongoing concerns I have about your level of performance in your role.

We met on ***[Date, time and location]***.

Attending our meeting was ***[Names of Attendees]****. (If no representative was present include the following sentence)*. You confirmed to me that you were happy to hold our meeting without a representative being present.

We held our meeting under the Capability Policy, a copy of which I sent to you in my letter dated ***[date of letter invite to Formal Review meeting].***

We went through what discussions we have already had in relation to my concerns and any issues you have raised. We have previously discussed ***[Enter a brief overview of discussions previously held and any agreement around support and/or time given to allow your employee to achieve the standards required]***.

I talked through some specifics examples of the areas where I have concerns over your performance:

1. ***[Enter brief examples]***

I gave you the opportunity to discuss with me any views you have around these and any ongoing reasons you feel might be causing you not to perform to the required standards.

You explained ***[Include points raised by employee either in agreement or disagreement with the performance issues you have raised. Cover any reasons given by the employee for not being able to perform to the standards required and your responses]***.

*(\*Delete paragraph as appropriate)*

**Formal Review Period**

(If you are placing your employee on a Formal Review Period use the following 5 paragraphs)

**\***I confirmed that as there are ongoing issues with your performance we do need to make sure there is an improvement and therefore you have been placed on a Formal Review period for ***[length of monitoring period e.g. 3 months’]***, commencing ***[date]*** and ending ***[date]***. We have agreed specific objectives which will need to be achieved during the monitoring period, and also discussed and agreed an action plan to support you in achieving the standards required (a copy of which is enclosed). If there are any points you are unsure of in the action plan, please raise these with me as soon as possible.

\*We will ensure that regular one-to-one review meetings are held during the Formal Review period to discuss your progress and the support you are receiving. We will also hold a formal Mid Review meeting which will take place on ***[date and time]***. I will write to you closer to the date to confirm the full details. Please make sure you keep this date and time free and if you want to bring a representative, you make them aware of the date and time in advance so they can make sure they are available.

\*I appreciate that being on a Formal Review may be concerning for you and therefore wanted to remind you of our Employee Assistance Programme. The service is available 24 hours a day, 7 days a week, providing professional help to deal with work or personal issues. If you feel you might benefit from accessing this programme you can either call the 24 hour telephone line on **0800 716017**.  Alternatively if you just wanted to find out more about it you can visit their website [www.employeecare.com](http://www.employeecare.com), the ‘access code’ and ‘password’ are both 72992.

\*I hope that together we can ensure you will be able to improve your performance.

\*If you have any questions please let me know by either calling me on ***[Telephone number]*** or email me at ***[Email address]*** or raise them during one of our one-to-one meetings.

OR

**Not moving to Formal Review Period** *(Note: this option should only have been used if you felt you had not covered all the areas for consideration as outlined at the beginning of the Capability Policy and therefore felt that there was other support that could be offered around either personal issues or medical issues the employee has, before moving to the formal stage)*

(If not moving your employee to a formal review period include the following 3 paragraphs)

**\***Due to the ***[whether personal, medical or other]*** reasons you raised as to why you feel you are still having ongoing issues with your performance; we agreed not to place you on a Formal Review at this moment in time. We did however discuss that there needs to be an improvement in your performance and therefore went through the standards required. We agreed the following support; ***[support details]***. You also agreed to ***[any details of what your employee has agreed to do themselves to manage the reasons/issues they have raised]***. We will hold a review meeting in ***[period]*** weeks/months to discuss your progress and whether there has been an improvement or whether we need to move to a Formal Review period.

\*Our next review meeting will take place on ***[date, time and location]***. I will write to you closer to the date to confirm the full details. Please make sure you keep this date and time free and if you want to bring a representative, you make them aware of the date and time in advance so they can make sure they are available.

\*If you have any questions please let me know by either calling me on ***[Telephone number]*** or email me at ***[Email address]***.

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,

***[Name]***

***[Job Title]***

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

Encl.  ***[Enter relevant details]***