

PERFORMANCE MANAGEMENT SUPERVISOR CHECKLIST

This checklist may be helpful in analyzing a volunteer problem and determining the appropriate disciplinary action. It is intended to help the supervisor remain objective in analyzing and administering progressive disciplinary action. "No" answers may indicate that more information, further analysis, or non-disciplinary action may be required. You should answer all of the questions before deciding on a plan of action. Then consult your next-in-line supervisor (or Commissioner) and/or Volunteer Services.

PRE-DISCUSSION SUPERVISOR SELF EVALUATION		
Do I have a performance problem that warrants a conversation/coaching?	YES	NO
1. Have you clearly communicated performance goals to the volunteer?		
2. Have you first communicated with the volunteer to see if there is a performance deficiency that requires additional training?		
3. Is the discipline based on a legitimate complaint or concern?		
4. Can you give specific examples of how this volunteer has failed to meet performance or behaviours standards?		
5. Have you given opportunities for questions and problem solving?		
6. Are you prepared to meet with the volunteer in a calm and friendly manner?		
7. Have you arranged to meet in a quiet place where you will not be disturbed?		
8. Have you allotted enough time to allow both you and the volunteer to discuss the problem and arrive at a solution?		
9. Have you thoroughly reviewed the steps of progressive discipline?		
10. Do you need support for the coaching conversation?		
PERFORMANCE PROBLEM		
If the volunteer is not adequately performing the role/tasks as assigned	YES	NO
1. Does the volunteer understand our expectations? What to do? How to do it? Why to do it? When to do it?		
2. Does the volunteer have access to and know where to find written instructions and procedures?		
3. Has the volunteer ever demonstrated the skill?		
4. Is it a skill the volunteer can be taught?		
5. Based on experience or education, is it a skill the volunteer should possess?		
6. Could the volunteer perform the skill if he or she wanted to?		
7. Is the role/task expected reasonable?		
8. Has the role/task changed?		
BEHAVIOR PROBLEM		
If the volunteer's behaviour is inappropriate/unacceptable	YES	NO
1. Does the volunteer understand our behaviours expectations?		
2. Does the volunteer understand acceptable behaviour?		
3. Has the behaviour been acceptable in the past?		



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Scouts Canada depends on supervisors to communicate Scouts Canada policies, standards, procedures and practices. Since the supervisor determines role tasks, duties and performance expectations, these must be clearly communicated.	YES	NO
1. Did we provide an appropriate onboarding/orientation?		
2. Have we provided adequate training?		
3. Can the volunteer function within the Group or Section without using the deficient skill?		
4. Do you reinforce acceptable behaviour?		
5. Has acceptable behaviour been clearly communicated to the volunteer?		
6. Have you previously discussed this problem with the volunteer to get an explanation?		
7. Do you understand the volunteer's explanation?		
8. Have you questioned the people involved, including those mentioned by the volunteer?		
9. Do you know the basic facts (i.e., dates, times, places, people involved)?		
10. Have you separated the disputed facts from the undisputed facts?		
11. Have you considered any mitigating or aggravating circumstances, which may affect the level of disciplinary action?		
12. Have you checked Scouts Canada's Policies, Standards and Procedures?		
13. Is there a past history of enforcing disciplinary action for the same offence (or similar offences)?		
14. Has the volunteer been a member in this role a long time?		
15. Is the volunteer's historical performance below their peers?		
16. Did the volunteer know (or should they have known) the rule or policy?		
17. Is the policy/procedure that has been violated a reasonable one?		
18. Did the inappropriate behaviour result in cost to others?		
19. Did the inappropriate behaviour result in danger to other?		
20. Have you set a date to follow up with the volunteer?		
21. Have you determined the appropriate disciplinary action?		
22. Have you consulted Human Resources? Safe Scouting?		
23. Above all, have you documented your investigation in writing?		

