

**EMPLOYMENT LAW  
SEMINAR  
FOR EMPLOYERS**

**DOCUMENTATION,  
PERFORMANCE  
EVALUATIONS  
and  
EMPLOYEE  
HANDBOOKS**

Presented by:

**Jay G. Putnam, Attorney and  
Larry Levy, Employee Relations  
Management**

**Thursday March 19, 2020  
8:30 a.m. – 11:30 a.m.**

**North Coast Builders Exchange  
1030 Apollo Way, Santa Rosa**

**\$50 for members of NCBE  
\$100 for non-members**



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Expert guidance will be provided in this fast-paced workshop which will cover the importance of proper and timely employment documentation, how to conduct performance evaluations and the benefits of having an up-to-date, legally enforceable employee handbook for your employees. Bring your questions and concerns!

~ Continental Breakfast will be served~

***To Register: Please call [Kassandra Villasenor – \(707\) 542-9502](tel:7075429502)  
or email at: [kassandra@ncbeonline.com](mailto:kassandra@ncbeonline.com)***

# DOCUMENTATION, PERFORMANCE EVALUATIONS AND EMPLOYEE HANDBOOKS

## Seminar Outline

- I. What is Documentation?
- II. The Purpose and Philosophy of Documentation: Why Bother?
- III. The Importance of Documentation in Today's Litigious Environment
- IV. The Various Forms of Documentation
  - a. Job Applications
  - b. Offer Letters
  - c. Employee Warning Notices
  - d. Performance Evaluations
  - e. Employee Handbooks
  - f. Written Job Objectives and Job Descriptions
- V. The Supervisor's Feelings in Preparing any Documentation
- VI. Key Approaches in Preparing any Documentation
  - a. Objectivity
  - b. Subjectivity
- VII. How do you Prepare Effective Documentation?
  - a. Formal vs. Informal
  - b. Timing
  - c. Frequency
  - d. Involving Human Resources
  - e. Employee's Signature
  - f. Consequences
- VIII. Meeting with the Employee
- IX. How to Prepare Employee Warning Notices
  - a. Paragraph #1 - Purpose of the notice
  - b. Paragraph #2 - What did the employee do or not do?
  - c. Paragraph #3 - What rule or policy did the employee violate?
  - d. Paragraph #4 - Consequences to the organization for violations of this policy
  - e. Paragraph #5 - Management's plan for the employee regarding this violation (notice, warning, probation, suspension, termination, etc.)
  - f. Paragraph #6 - Consequences should a violation reoccur in the future
  - g. Paragraph #7 - Future meetings to coach the employee
  - h. Signatures of both the supervisor and employee
- X. Group Exercise