St. Cajetan Parish — Fictional Training Example

To: Jordan Ellis, Parish Administrative Assistant (fictional)
From: *Casey Morgan, Parish Business Manager (fictional)*
Date: November 2, 2026
Subject: Notice of Performance Improvement Plan

Training example only. All names, events, and dates below are fictional. Use this completed form as a model for documenting specific examples, measurable expectations, support, and follow-up; acknowledgment signatures are intentionally blank.

During the past month, October 1–31, 2026, it has become increasingly evident that you have not been performing your assigned work in accordance with what is expected of your position as Parish Administrative Assistant. Examples involving communication accuracy, proofreading, coordination with other departments, and basic computer tasks are outlined below.

You were counseled on this unacceptable performance on October 9 and October 23, 2026. To date, significant improvement has not been made. St. Cajetan Parish values you as an employee, and it is our intent to make you fully aware of this situation and to assist you in improving your work performance. The responsibility to improve, however, is yours alone.

You are being placed on a written performance improvement plan. For the next 30 calendar days, from November 2, 2026, to December 1, 2026, your work will be closely monitored. You must demonstrate immediate improvement in the following areas:

Observed Performance Deficiency	**Objective / Standard**	**Action Plan / Items to be accomplished during PIP**
Communication quality: The October 8 parish email contained spelling errors and conflicting event times, requiring a corrected message.	All distributed communications must be free of spelling and grammar errors and contain accurate dates, times, locations, and contact information.	Use the parish template and spelling/grammar tools. Read each draft in full; verify event details against current approved sources. Submit drafts to the manager at least one business day before release for approval.
Work verification: The October 15 email was sent without its referenced attachment; the October 22 bulletin repeated an outdated registration deadline.	Complete a pre-release check for every communication. All required attachments, working links, current deadlines, and intended recipients must be verified before distribution.	Manager provides a checklist on November 2. Complete and retain it with each final draft; open attachments and test links. Present completed checklists and corresponding communications at each weekly review.

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Department coordination: The October 20 announcement included an unconfirmed Faith Formation fee and an outdated Facilities room assignment, requiring both departments to issue corrections.	Obtain written confirmation from the responsible department for all information attributed to that department before submitting the communication for final approval. Do not publish unconfirmed details.	Request department review at least two business days before release. Retain confirmations with the draft. If information is missing or conflicting, notify the manager before the deadline rather than assume accuracy.
Basic computer tasks: On October 14 and 21, routine assignments required repeated assistance to format a Word notice, save the correct version, create a PDF, and attach it to an Outlook email.	By November 16, independently complete two consecutive practice assignments: format a notice using the template, save the correct version in the designated folder, create a PDF, and prepare an email with the correct attachment.	Manager arranges hands-on training by November 6 and provides written job aids. Practice using sample files; demonstrate both assignments by November 16. Apply these steps to routine work through December 1.
Spreadsheet accuracy: The October 28 event roster contained duplicate entries and omitted approved updates; assistance was needed to enter corrections and sort complete records.	By November 16, accurately enter, update, and sort a sample Excel roster without separating records. Thereafter, weekly rosters must match approved source information with no duplicate or omitted entries.	Complete manager-arranged Excel practice by November 13 using fictional data. Compare entries with the source and check for duplicates. Demonstrate the process November 16; bring weekly rosters and source records to reviews.

I will review your progress on each item requiring improvement on November 9, 16, 23, and 30 at 10:00 a.m., with a final review on December 1, 2026, at 10:00 a.m. Reviews will include completed communications, checklists, department confirmations, and computer-task demonstrations; progress and remaining gaps will be documented. Improvement must begin immediately and be maintained. If any objective of this improvement plan is not met at any time during the specified time frame, disciplinary action, to include separation from St. Cajetan Parish, may occur.

A decrease in performance after successfully completing the improvement plan may also result in dismissal from St. Cajetan Parish without the issuance of another warning or improvement plan. I am available to discuss any issues or concerns you may have as you work through this plan. Your signature acknowledges this discussion. It does not indicate agreement or disagreement with this plan.

_____ _____

Employee Signature Date

_____ _____

Manager Signature Date

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