

TEACHING THE ART OF EMPLOYEE DISCIPLINE TO EDUCATIONAL LEADERSHIP CANDIDATES*

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Abstract

This activity is designed to be utilized in a School Law class, but is also appropriate for a class in Human Resources. Holding students and staff accountable for their actions is essential to a well run school. School principals are prepared to deal with student accountability and student discipline issues, but rarely are principals ready to deal with behavioral infractions by staff members. This instructional module insures that the educational leadership student will understand due process rights, the doctrine of progressive discipline, and how to hold staff members accountable through documentation. The critical skill that the educational leadership student will obtain from this activity is the ability to write a thorough and legally sound letter of reprimand or warning addressed to a school employee to lay the foundation for possible further disciplinary action, including dismissal. The letter of reprimand or warning written by the educational leadership student will be comprehensive and able withstand scrutiny in a court of law. *Author: Paul Hewitt, University of Arkansas*



NOTE: This manuscript has been peer-reviewed, accepted, and endorsed by the National Council of Professors of Educational Administration (NCPEA) as a significant contribution to the scholarship and practice of education administration. In addition to publication in the Connexions Content Commons, this module is published in the *International Journal of Educational Leadership Preparation*,¹ Volume 6, Number 3 (July - September, 2011), ISSN 2155-9635. Formatted and edited in Connexions by Theodore Creighton and Brad Bizzell, Virginia Tech and Janet Tareilo, Stephen F. Austin State University.

*Version 1.4: Sep 9, 2011 12:19 pm GMT-5

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1 Sumario en español

Esta actividad es diseñada para ser utilizada en una clase de la Ley de la Escuela, pero es también apropiado para una clase en Recursos humanos. Teniendo a estudiantes y provee responsable para sus acciones es esencial a un pozo corre la escuela. Los directores de la escuela son preparados para tratar con responsabilidad de estudiante y asuntos de disciplina de estudiante, pero es raramente directores se preparan para tratar con infracciones conductistas por empleados. Este módulo instruccional asegura que el estudiante educativo de liderazgo comprenderá los derechos debidos de proceso, la doctrina de disciplina progresiva, y cómo tener a empleados responsables por documentación. La habilidad crítica que el estudiante educativo de liderazgo obtendrá de esta actividad es la capacidad de escribir una carta completa y legalmente sano de reprimenda o advertencia dirigió a un empleado de la escuela para colocar la base para la acción aún más disciplinaria posible, inclusive despido. La carta de reprimenda o advirtiendo escrito por el estudiante educativo de liderazgo será completo y capaz resiste a averiguación en un tribunal de justicia.

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2 Teacher Accountability: Effective Discipline Practices

Standards

ELCC Standards 2c, 3c, 5a, Building Level (Draft Standards)
ELCC Standards 3.1b, 3.1c, 3.2c, 5.1a, 5.3a. (January 2002)

3 Introduction

The focus of administrator training is to create educational leaders who can manage a complex organization and the people who staff it. Unfortunately, there are often events that take place which put the administrator in a position where they must hold staff accountable for their actions, including the imposition of disciplinary action. Jacobsen, Sperry and Jensen (1972) reported that teachers who should be dismissed often maintain their employment because school administrators often don't possess the skills or courage to proceed through the disciplinary and dismissal process. Most administrators are not prepared to be effective evaluators or to administer employee discipline (Loup, Garland, Ellet, & Rugutt, 1996). This lack of training in employee discipline is supported by Franklin and Pagan (2006) who reported that a major deterrent to effective employee discipline was a poorly designed system and administrators who are not prepared to effectively administer disciplinary procedures. Bridges (1992) reported that teacher incompetence, which could lead to dismissal, is rarely a single incident event. Teachers who commit acts or violate regulations will often repeat their behaviors unless they are immediately held accountable. It is critical for an administrator to accurately document employee misbehavior to insure that the behavior will not reoccur and if it does reoccur, further disciplinary action up to and including dismissal can be taken. Often a principal may not want to confront a teacher or classified employee in a mistaken effort to avoid disrupting the organization or the employee. This avoidance of employee discipline is referred to by Battenheim (1997) as the Doctrine of Mistaken Kindness. In an effort to be kind, the principal is not effectively laying a legal foundation for further disciplinary action or possible future dismissal.

In administering employee discipline the most important document is the letter of warning or letter of reprimand which is then presented to the employee and placed in their official personnel file. The basic components of a letter of reprimand were defined by Ramsey (1998) as: a clear statement of the problem and a listing of all deficiencies; a statement of the foundation for the reprimand with references to specific incidences and observations; the negative impact of the employee behavior, the corrective action of behavioral change the employee must make; a list of support interventions the employer will provide including training, mentoring and coaching; and a time by which the employee must conform to the change and demonstrate

improved performance. Although most disciplinary action is based upon clearly defined overt behaviors, attitude can also have an effect on the organization and impact behaviors. Flynn (1998) reported that it is extremely difficult to terminate an employee for poor attitude, but poor attitude leads to poor behavior and behavior can be successfully documented. Documentation must include specific examples of behavior and its impact on the workplace. School principals are often over-worked and have little time to conduct extensive evaluations and write lengthy letters of reprimand for which they are ill prepared to compose. Rothstein (2001) reported that schools today are under-staffed at the administrative level with principals often charged with evaluating as many as 30 teachers. Regardless of the challenges and barriers facing the school administrator, to effectively manage the organization and maintain a productive school climate the administrator must be confident in dealing with employee discipline issues and be able to competently write a high quality letter of reprimand or warning.

4 Goal

To insure the educational leadership student has a clear understanding of all the elements needed to document employee misconduct through the writing a comprehensive and legally sound letter of reprimand/warning.

4.1 Overview of the Module

This module is currently used in a school law class designed for entry level educational leadership students. The module could also be incorporated into classes on Human Resources Management or the Principalship. The School Law class is designed to acquaint the educational leadership student with the roles and responsibilities of the principal in understanding and conforming to legal requirements and precedent. The instructional strategies used in this class include simulations, case studies, selected readings, instructor led presentations, video support materials, class discussion, and guest speakers. This module is one of the hands on activities used in the class. This activity would also be easily adaptable to an on-line format using Elluminate Live or Skype software and a Discussion Board found on the Blackboard platform.

The activity presented in this Module focuses on the actual writing of a letter of reprimand/warning. The teaching of the concept of due process and progressive discipline are critical components for the background to this module. However, it was felt that this content is standard in textbooks and other instruction materials for School Law and Human Resource classes and that replication of this easily accessible material would only lengthen this module and detract from the focus of the learning activity.

The hands-on activities are based on actual staff disciplinary actions and are not theoretical or fabricated. The names and some of the circumstances have been slightly modified to maintain confidentiality, but the incidents are actual school employee disciplinary issues. This foundation in real-life employee misconduct gives the educational leadership student an understanding of the actual situations they might face as building level administrators.

The teaching activity is broken down into hands-on writing activities, instructor presentation, and a high degree of student interaction. The activity normally takes two class periods of three hours to provide in-depth coverage. The activities will not be given specific time frames but will be organized in a sequence of activities to allow for the free flow of interaction to occur in the class.

4.2 ACTIVITIES

4.2.1 Introduction/Set

The educational leadership students are asked to tell of situations they have observed in their own schools in which employee behavior resulted in, or should have resulted in, disciplinary action. The educational leadership students are reminded that they should not share the specific names of individuals or other elements that might identify a specific individual. The educational leadership students then discuss the type or extent of disciplinary action that was, to their knowledge, taken. In most instances the educational leadership students will report that disciplinary action either wasn't taken or it wasn't, in their viewpoint, adequate. The

educational leadership students then discuss and develop a list the reasons they feel the appropriate action wasn't taken. During the discussion, one of the main reasons usually identified for inappropriate or ineffective action is a lack of training or preparation on the part of the school administrator. Should the educational leadership student not arrive at this conclusion the instructor can review the introduction to this module and ask the educational leadership students if they feel prepared to write letters of reprimand/warning? This leads into the first activity.

4.3 Activity 1: Write a Letter of Reprimand

The educational leadership students are given a detailed scenario involving a teacher who has broken school and district regulations (See Appendix A). The educational leadership students are then instructed to take a sheet of paper and draft a letter of reprimand for the teacher involved this situation. The educational leadership students are instructed to make the letter as real as possible and create it in memo format specifying who the memo is addressed to, from, and the topic of this letter of reprimand. The instructor will give no further details about format or the content that should be included. The educational leadership students are being asked to do this activity to the best of their ability. The actual writing of the letter of reprimand will take about 20 to 25 minutes.

When all educational leadership students have completed their letters of reprimand they will then share their letters with the entire group. In a large class this can be done in groups of 6-9 students. The educational leadership students will then break down the letters of reprimand and list those elements they felt were powerful and what elements they felt were not effective or appropriate.

4.4 Activity 2: Instructor Led Presentation of the Format

In activity 1, the educational leadership students wrote a letter of reprimand using limited prior knowledge and experience. In this activity the instructor will explain the elements of an effective and legally defensible letter of reprimand using the "Organization and Content Outline: Letter of Reprimand/Warning" as presented in Appendix B. This template or guide was developed by combining materials acquired from school law workshops and utilizes the common or high utility elements. The "Organization and Content Outline: Letter of Reprimand/Warning" was then reviewed by three currently practicing attorney's who specialize in school law to insure the outline met all legal requirements. The instructor should emphasize that the "Organization and Content Outline: Letter of Reprimand/Warning" is a template or guide to ensure the school administrator includes all the factual and pertinent information needed to write a legally defensible letter of reprimand/warning. However, there are instances in which all elements may not be present due to a lack of facts or other reliable information. A letter of reprimand/warning doesn't have to include every element, but the letter will be strengthened by the inclusion of as many elements as possible.

4.5 Activity 3: Review of Sample Letter of Reprimand for Mrs. Susie Smith

Following discussion of the various elements included in the "Organization and Content Outline: Letter of Reprimand/Warning", the instructor will give the educational leadership students a copy of a model letter of reprimand which is found in Appendix C. This is a model letter written to Mrs. Susie Smith by her principal, Hugo Boss, and covers the incident reviewed in Activity 1. The students will then break into groups of 2-3 and read the letter of reprimand and identify the elements found in the "Organization and Content Outline: Letter of Reprimand/Warning." This activity provides a content methodology which allows the educational leadership students to visualize the elements of a well written letter of reprimand in context. The students are instructed to identify all the elements of a high quality letter of warning, review their own letter of reprimand from Activity 1, and compare and contrast it with the letter of reprimand provided in Appendix C. This activity allows the students to examine which elements they instinctively included in their own letter of reprimand and the elements that need to be added to develop an improved and more powerful letter of reprimand.

4.6 Activity 4: Write a Comprehensive Letter of Reprimand

The educational leadership students have now attempted to write a letter of reprimand/warning based on a real-life scenario, analyzed their initial letter following a highly defined organization and content outline, and compared their letter with a model that incorporates most elements of an effective letter of reprimand/warning. The educational leadership students are then given a second scenario of employee misconduct which is included in Appendix D. The educational leadership students will then write a letter of reprimand/warning utilizing as many of the components of the "Organization and Content Outline: Letter of Reprimand/Warning" as possible. When the letters are completed the educational leadership students will then share their letters with their peers in small groups to compare and contrast the letters with the components found in the "Organization and Content Outline: Letter of Reprimand/Warning." The educational leadership students will look at how each student phrased their letter and how they might improve their letter. Following this analytical process the instructor will review each letter and provide written feedback to the Educational leadership students using the Scoring Rubric which is located in Appendix E "Scoring Rubric."

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5 Appendix A: Letter of Warning Simulation

Mrs. Susie Smith is a second grade teacher who has been teaching in the district for the past six years. She was originally hired to work at another school and after three years was transferred to your school. The principal of her previous school acknowledges that he should have never allowed her to receive tenure. You have regularly evaluated her and she has consistently received unsatisfactory evaluations. You have referred her to the Peer Assistance Program and it has brought about almost no improvement. Her classes are disorganized, lessons have gaps of information missing and the students are often confused. At times she just seems oblivious to reality. It's like she doesn't see what's happening around her.

Several times this year she released her students early to lunch. You looked at your calendar and noted that on April 15, 2011, April 27, 2011 and May 18, 2011 you spoke to her and explained that she must wait until the bell rings to release her students. You explained that the campus/lunch supervisors were not yet on duty and there was a liability issue due to a lack of supervision. You also explained that the cafeteria staff was not ready for the students and their early arrival created an undue stress on the staff. Mrs. Smith explained that she was just trying to reward her students for their good behavior and didn't see a problem, but that she wouldn't do it anymore.

Then on May 27, 2011 you get a call from two teachers who reside in classrooms next to Mrs. Smith. They inform you that Mrs. Smith let her students go early to lunch. When the students left their room and walked to the cafeteria, about 8 minutes early, they made a lot of noise that disrupted other classes in the area. This created a problem for Mrs. Smith's neighboring teachers as they complained that their students

wanted to know why they couldn't leave early like Mrs. Smith's class. The cafeteria called and said that they run on a very tight timeline and they weren't ready to serve students who arrived 8 minutes early. Since the noon supervisors hadn't arrived yet, the students were rowdy and out of control distracting the cafeteria workers from their jobs. Needless to say, you are not happy about this.

You immediately walk down to Mrs. Smith's room and find her working on math problems with three students. You ask her to send the students on to lunch. When the student's leave you ask her why she let her other students leave early for lunch. Mrs. Smith explains that she had three students that weren't getting the math problems and that she thought if she just had a few minutes alone with them she could help them individually before they left for lunch. Since she didn't want these three students to miss the lunch period or be late to lunch she thought she'd just let the rest of the class go a little early and then she could help the in-need students. You mentioned to her that you had talked to her before about not letting students go early. She said that yes you had mentioned this, but she just didn't see any real problem with it. You are tempted to explode, but you hold your temper and walk away.

You schedule an official meeting with Mrs. Smith and inform her that disciplinary action may result and that she has a right to bring a representative from her union along.

At the meeting you remind Mrs. Smith that you had talked to her on three prior occasions and that you were surprised that she would release her students early. She again states that she was only doing it to help students, which is what her job is all about. She also states that she can't see any harm in what she has done. She says she won't do it again, but then again she said that the last three times! During the meeting the union representative asked a few questions but is otherwise a little more silent than you usually see her.

You've looked at your contract and after two verbal warnings you can write a letter of warning which will be placed in her personnel file. Now you just have to write the letter.

6 Appendix B: Organization and Content Outline: Letter of Reprimand/Warning

6.1 Objective Elements

- **Writers Intent:** What is the purpose of the letter? Be specific.
- **Report all the Facts:** Clearly define the Who? What? When? Describe how you gained information on the situation. Be Specific.
- **State Your Support:** Cite the rules, policies, regulations that have been violated and that give you the authority to write this letter. This can include job descriptions, faculty handbooks, memos outlining procedures, or the dates of faculty meetings when the issues were discussed.

6.2 Results of the Behavior

- **Consequence of the Behavior:** Clearly define and explain the effect this behavior has on students, teachers, classified staff, parents, and administration.
- **Prominence of the Behavior:** explain any complaints from students, teachers, classified staff, parents, and administration.
- **Currency:** Discuss the currency of time. If this behavior was not immediately addressed, explain why. If it was addressed immediately, note that as a recognition of the severity/importance.
- **Employee Preparation:** Identify the training that should have made the employ aware that their behavior was not appropriate. This could include initial teacher preparation, in-service training, memos, handbooks, or just common sense.
- **Context:** Define the circumstances that surround this issue. Explain any issue that might have caused this or contributed to the problem.
- **Employee's Reason:** During the fact finding/interview process and in prior discussion with the employee, clearly explain the reason they gave for their behavior.

- **Previous Intervention:** List any prior assistance that may have been given to the employee to assist them in correcting the behavior. This could include but isn't limited to training programs, mentor support, or discussions with teacher or administrative leaders.
- **Habituation:** Describe the likelihood that this behavior will continue to occur in the future and explain why you believe there is a high probability of reoccurrence.
- **Rights of Others:** Define the impacts that the behavior has on other people in the organization and the operation of the organization both now and in the future.

6.3 Specific Directives and Outcomes

- **Expected Behavior:** Specifically define the expected changes in behavior that are needed. These recommendations should clearly define exactly what is needed for improvement.
- **Support:** Clearly define the offers of support that you will provide for the employee to be able to achieve the demands made for improvement.
- **Measurement:** Clearly define how progress or success will be met. Include a specific timeline during which the behavior cannot be repeated and or a time when it must be stopped.
- **Follow-up:** Define and schedule the dates and times that the evaluator will follow-up to measure progress. This can be every day, once a week, or whatever time frame that seems appropriate.

Right to Respond: Almost every state requires that some statement of a right to respond and notification that the letter will be placed in the employees official personnel file is included in the letter. This statement is usually the last item on the letter of reprimand/warning. For further details see the California case of Miller v. Chico (1979) as an example.

7 Appendix C: Model Letter of Warning

June 1, 2011

To: Mrs. Susie Smith

From: Hugo Boss, Principal, Happy Valley Elementary School

Subject: Letter of Warning, Incident of May 27, 2011

This Letter of Warning is written in response to an incident that occurred on May 27, 2010 and is written in compliance with Article XXX of the Negotiated Agreement, Disciplinary Action. Prior to the beginning of the lunch period on May 27, 2010, I received calls that your students had been dismissed at least eight (8) minutes prior to the bell, which signifies the beginning of the lunch period, ringing. I immediately went to cafeteria to find approximately twenty-three of your students alone, unsupervised, in the cafeteria prior to the lunch bell ringing. I had to immediately take responsibility for the supervision of your unsupervised students. When a noon supervisor arrived to take over the supervision of your students I immediately went to your classroom to find you working with three students on math problems. After the three students left I asked you why the other students had been dismissed before the bell rang. You stated that you let them go so that you could work with the three students on math problems.

The Faculty Handbook clearly defines the school bell schedule and also states that students are not to be released prior to the ringing of the bells. In checking my calendar I noted that I spoke to you three times this year about releasing students early to lunch. I spoke to you on April 15, 27, 2010 and May 18, 2010 and explained that releasing students early was hazardous to them and exposed the school and district to liability because they were unsupervised. I told you on each occasion that you were not to release your students early to lunch. You stated to me that you wouldn't release your students early anymore.

Your behavior in this incident has a direct impact on other staff members. I received two calls from teachers who have classes near you who complained that the noise made by your students disrupted their instruction and that their students wanted to be released early too. This was a disruption to these classes that would not have occurred if you had held your students until the bell rang. I also had a call from the cafeteria staff complaining that your unsupervised students were disruptive and made it difficult for them to

do their jobs and get ready for the arrival of students for lunch. Since this incident occurred on May 27, 2010 it has become common knowledge among the staff that you did not follow established school procedures. The fact that this incident occurred within a month and a half of me telling you three times not to release your students only underlies the seriousness of this incident.

I know you are aware that students are not to be released prior to the bell ringing because we have talked about it on the three occasions mentioned previously and also at the beginning of the year when we, as a staff, went through the faculty handbook which included a discussion about the bell schedule and student dismissal.

When I asked you why you had released your students early on May 27, 2010 you stated to me that you were doing it so you could work with three students individually on math problems and that by releasing the class early you could help them and that they wouldn't miss their lunch period. During our conference/meeting on May 30, 2010 you stated that it was your job to help students and that you still didn't see a major problem in what you had done. Given the fact that I have spoken to you on three prior occasions prior to the incident of May 27, 2010, I must detect a pattern of continued conduct and behavior that has a strong likelihood of recurrence. I must also state that you have no policy or contractual right to release your students early.

I must stress the seriousness of this situation. Your actions have had a negative impact on other staff members and made it difficult for them to perform their jobs. You have also placed this school and the school district at risk. Should one of your students be injured as a result of your actions the school and school district would be liable for those injuries not to mention the needless injury to a student.

In the future you are directed not to release your students prior to the bell ringing unless given specific permission by me, or a member of my administrative staff. I will monitor your classroom on a daily basis to insure that students are not released early and this incident will become a part of your annual evaluation. If you have any questions, at any time, about school procedures you are to ask me as soon as practicable.

Failure to comply with the directives of this Letter of Warning will result in further disciplinary action per Article XXX, up to and including dismissal.

This document will be placed in your personnel file. If you wish to respond to this document either orally or in writing, you may do so within 5 calendar days from the date below. If you submit a written response it will, be attached to this document and placed in your personnel file.

(Date) (Signature, Susie Smith)

(Date) (Signature, Hugo Boss)

8 Appendix D

9 Appendix D: Letter of Warning Simulation

Mr. Jose Jones has been a day custodian at Springville Elementary School for ten years. He has done a barely adequate job and seems to know just where the line is between mediocre and poor. Over the last six months you have seen a definite drop off in his job performance in the afternoon. One time you came upon him and it looked as if he may have been sleeping. He just doesn't seem to be "with it." Then, one day you are shocked to find out what is really happening.

You get a phone call from a parent who lives a few blocks away, right across the street from a small neighborhood convenience store. She explained to you that she has been watching out her front window and every day Jose rides a small stingray bicycle (Jose isn't very big and doesn't drive a car) to the little store on his lunch hour (actually it is a half hour). He goes into the store and gets a quart of beer, which he keeps in the brown paper bag. He then sits on the wall next to the store and has a cigarette and the beer for lunch and then rides the stingray back to school.

It would be almost impossible to catch him as he has a pretty good field of vision in all directions, so you get an idea. You give the parent one the schools video cameras and ask her to film him and then go over

and pull out the bottle from the trash can where he tosses the bottle and returns to school. Little did you know that this parent is a real prodigy of a film maker. She goes one step further than you suggested and tapes the trash can before lunch to show it is completely empty. On October 16, 2010, she films Jose as he drinks his lunch, tosses the bottle into the trash can and then rides back to school on his stingray. Without stopping the camera she walks it across the street and pans it into the trash can which reveals the can is still empty except for one bottle in a paper bag. You see her hand reach in, pull out the bag, and remove the beer bottle from the bag. Jose likes Budweiser.

The parent then immediately hops in the car and brings you the tape and the empty bottle of beer and its bag. You thank her and then go out looking for Jose. You find Jose and ask him if he has been drinking and he tells you that he hasn't and that he would never drink on the job. You ask to smell his breath and he complies but his breath smells as if he had chomped a whole tin of breath mints. Because of the seriousness of the situation, the Classified Contract, Article XIV, Discipline, allows you to skip most of the progressive steps and you tell him that he is suspended for the remainder of the day and tomorrow, with pay, and that you will meet with him and his union representative on October 18, 2010 at 10:00 am.

On October 18, 2010 you meet with Jose and his Classified Union Field Representative and tell them that it has been reported to you that Jose had been drinking during his lunch break on October 16, 2010. Jose vehemently denies any of it and his field representative vigorously defends him. You then tell them you'd like to share a home movie with them and you also place the beer bottle, in the brown paper bag on your desk. After watching the film you can tell the Classified Union Field Representative is furious with Jose. Jose, being quick on his feet says that he never drank "on the job" because it was off campus and during his lunch hour. The Classified Union Field Representative asks if he can have a moment to speak with Jose. The walls are pretty thin so you can hear that their conversation is a little heated and the Classified Union Field Representative is extremely unhappy that Jose had lied to him. They return and Jose, quite humble, admits his guilt and pleads to be given a second chance and that he not be fired. Being a real bleeding heart liberal you decide that you won't fire him but that you need a very strong letter of reprimand which includes a requirement that Jose attend drug and alcohol counseling.

Now, write a letter of reprimand using as many elements of the "Organization and Content Outline: Letter of Reprimand/Warning" as possible.

10 Appendix E: Scoring Rubric

Employee Discipline: Writing a Letter of Reprimand

Category		1	3	5
Overall Design		The candidate wrote a letter which was not professional in appearance, and did not include specific information such as date, school/district name, recipients name, or author with title.	The candidate wrote a letter that was of good format and appearance with all specific information.	The candidate wrote a letter that was professional in appearance and included all parties involved in the incident and had a clearly defined purpose with all specific information included..
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Construction		The candidate wrote a letter that was vague and didn't clearly define the intent.	The candidate wrote a letter that flowed well and was ordered but lacked specific details and intent.	The candidate wrote a letter that had all pertinent, information and flowed in a clear sequence of well defined details with a clear well defined intent.
Content		The candidate did not include the pertinent details of the incident.	The candidate included most the pertinent details of the incident but several key elements were omitted.	The candidate included <u>all</u> the pertinent details of the incident. in a clear sequence.
Outcome		The candidate did not clearly state the purpose of the letter or the expected outcome of the letter	The candidate was vague in stating the purpose and the expected outcome of the letter.	The candidate clearly stated the purpose of the letter, what the employee had to do to correct the situation, and what would occur if the employee's behavior continued.
Overall		The candidate included very little specific information and the letter was of little substance and power.	The candidate included all elements possible and wrote letter that was slightly vague, indirect, and would not hold up under legal scrutiny or challenge.	The candidate wrote a letter that included all possible elements and was highly directive with a high probability of correcting the employee's behavior, and would also have a high probability of holding up under legal scrutiny.
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Table 1

Point Total _____
Additional Comments: