**Appendix 5**

THIS IS A TEMPLATE LETTER – PLEASE AMEND IT AS NECESSARY TO SUIT THE SITUATION

Please transfer to the school headed paper.

Address

Date

Dear

**STAGE 1 FORMAL CAPABILITY MEETING**

I am writing to confirm that, following the informal review period, there remain ongoing concerns regarding your performance that have not been resolved through the appraisal process, day-to-day management, or the additional support provided. As a result, your performance will now be formally addressed under the Schools Capability Procedure (please find a copy attached).

I would, therefore, request that you attend a Stage 1 Formal Capability Meeting with [me or name of manager] to discuss these concerns further. A note taker will also be present at the meeting. The meeting will take place on:

Date:

Time:

Location:

The following performance issues that are causing concern that will be discussed are:

**[Insert performance concerns].**

To enable you to prepare for the meeting, I enclose the relevant paperwork in relation to your performance. (*e.g. PIP, notes of supervision meetings/lesson observations/examples of where work not met a satisfactory standard)*

You should be aware that the outcome of this Stage 1 Formal Capability Meeting could result in you being issued with a First Warning in accordance with the School’s Capability Procedure and further monitoring and review period will be set to assess your performance.

If you are issued with a First Warning, you will have further opportunities to improve your performance however, if there is no improvement and further formal action becomes necessary, you could be issued with a Final Warning or eventually dismissal from the school’s employment on the grounds of continued unsatisfactory/unacceptable performance.

You are entitled to be accompanied by your trade union or work colleague at this meeting, and I have attached a copy of this letter with enclosures for you to forward to them, if necessary. I would be grateful if you can notify me of their name in advance of the meeting.

I appreciate this may be a difficult time for you. You can access the School’s 24-hour Employee Assistance Programme for completely independent confidential support and advice, by telephoning [insert the company details] on [insert telephone number].

I enclose a copy of the School’s Capability Procedure for your information.

Yours sincerely

First Name and Surname

**Job Title**

Name of School