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ADVAITA INTEGRATED MEDICINE + GREEN HILL RECOVERY

MANAGER'S PLAYBOOK

REVISED 6/30/23

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Injury Reporting Guide		
Incident Report		
Additional Resources		
The Managers Handbook – Alex Maccaw		
What the Heck is EOS? – Gino Wickman & Tom Bouwer		
How to be a Great Boss – Gino Wickman & Rene Boer		



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Assessment of Competency & Interview Guide

Position: _____

Date: _____

Interview Team: _____

Preparation Checklist

Prior to conducting each interview be sure to complete the following.

1. Review application materials, including resume and any application forms. Decide which jobs/experiences are most relevant to the open job.
2. Prepare to conduct a background review.
 - Note any job/experience about which you are unclear or would like more information
 - Note any gaps in employment
3. . With the exception of questions specific to an individual's personal work experience, you should ask the same questions of every interviewee to ensure consistency and fairness.
4. Complete the Interview Guide for each candidate and forward copies to each interview team member with copies of candidate resumes.

Interview Opening

1. Greet the candidate and give your name and position.
2. Explain the purpose of the interview:
 - To acquaint interviewer with candidate
 - To learn more about candidate's background and experience
 - To help the candidate understand the position and organization
3. Describe Interview Process
 - Review candidate jobs and experiences
 - Ask questions to get information about jobs and experiences
 - Provide information about the position and organization
 - Answer candidate's questions
 - Point out that both of you will get information needed to make a good decision
 - Indicate that you will be taking notes

4. Explain the essential functions of the job and ask the candidate if he or she can perform the essential functions with or without reasonable accommodations.

Key Background Review

1. **Education**

College _____ Yrs _____ Degree/Major _____
GPA _____

High School _____ Yrs _____ Degree/Major _____
GPA _____

Other education/training _____

Sample Questions:

- What courses have you taken?
- Why did you choose your major?
- How has your college experience prepared you for a career in _____?
- What was your favorite class? Why?
- What was your least favorite class? Why?

Answers:

2. **Work Background**

Job/Experience 1 _____ Dates _____

Sample Questions:

- What were your major responsibilities/duties? Any change in responsibilities?
- What did/do you like best about the position. What did/do you like least?
- Why do you want to leave your current position?
- Ask other questions based on specific skills required for your open position.

Job/Experience 2 _____ Dates _____

Interview Questions – Competency Based

Question 1: Communication (This competency is included in every interview.)
Expressing ideas effectively, in individual and group situations (including nonverbal) adjusting language or terminology to the characteristics and needs of the audience.

- Appropriate grammar and vocabulary
- Organization of thoughts (clear and concise)
- Delivery (rate of speech, volume, eye contact, etc)
- Listening (active listening skills)

This competency is observable. Make note of each of the following throughout the interview.

Communication Ratings:

- 3 Communication Skills Exceed requirement for Successful Performance
- 2 Communication Skills meet requirement for Successful Performance
- 1 Communication Skills below requirement for Successful Performance

Selected Communication Questions:

- Describe a situation in which someone misunderstood something you said. How did you handle the situation?
- Tell me about a time when you were speaking to a group and had difficulty getting your point across.
- What types of writing have you done on your job? Give example.

Behavioral Observations – eye contact, enthusiasm, clear & concise answers, professional presentation, etc.):

For each question probe for answers to the following:

- What was the situation?**
- What did you do?**
- What was the end result?**

If the end result was not desirable, you may ask the candidate “What would you do differently?”

Question 2: Competency being evaluated- Teamwork

- Tell me about a time in which you strongly disagreed with a team member and how you handled the situation.
- Tell me about a recent team that you were a part of and how you determined roles and responsibilities.
- Tell me about a time that you stepped in to assist a team member.

Answer:

Question 3: Competency being evaluated- Decisive Problem Solving

- Describe a situation in which you had to make an important decision based on limited information. How did you decide what to do?
- Tell me about a significant decision that you were given sole responsibility for making. What did you do?
- Sometimes there is more than one right decision for any given situation. Tell me about a decision you've recently made, describe the alternatives you considered, and tell me why you chose the decision you did.

Answer:

Question 4: Competency being evaluated- Clinical Experience

- Describe your experience working with the young adult population.
- Describe your treatment approach/philosophy?
- What are the clinical areas you are least comfortable treating?
- What recent activities have you participated in to increase your professional knowledge?
- What skills or areas of expertise would you like to develop further? How might you achieve this goal?

Answer:

Question 5: Competency being evaluated- Client Relations

- Tell me about a client you treated who became more successful because of your help. What do you think contributed most to their success?
- Describe a time when your treatment effort was not successful. What would you do differently?
- Tell me about the most challenging client you have worked with. What did you do? What was the result?
- Describe changes in your field that will or have had an impact on your clients' needs. How will/How did you prepare?

Answer:

Question 6: Competency being evaluated- Understanding of Substance Use Disorder

- How do you view addiction?
- How do you view recovery?
- What do you feel are the most important aspects of treatment to recovery?

Answer:

Question 7: Competency being evaluated- 'Customer' Focus

- Give me a specific example of a time when you had to address an angry family member of a client.
- Tell me about a situation in which you helped resolve a problem for a family member.
- Describe a situation in which you realized you need to involve a supervisor or manager to resolve a client/family problem.

Answer:

Question 8: Competency being evaluated- Integrity

- Describe a situation in which you felt uncomfortable with a decision that could be considered unethical.
- Tell me about a time when you disagreed with a directive you received from your manager.

Answer:

Question 9: Competency being evaluated- Organizational Awareness

- Give me an example of how knowledge of your organization's culture helped you make a decision.
- Tell me about a time when you chose to take an action that was not in line with company policy. How did you make your decision?
- Tell me about an organizational change that you were involved in.

Answer:

Question 10: Competency being evaluated- Organization and Time Management

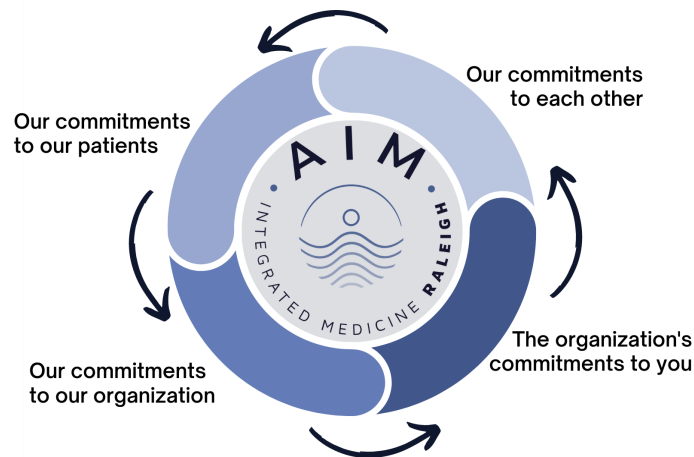
- What structure do you need to be successful?
- How are you best managed?
- How do you stay organized?
- What is your process for prioritizing competing items?

Answer:

Behavioral Observations – eye contact, enthusiasm, clear & concise answers, professional presentation, etc.):

Provider Agreements Template

Advaita Core Value: “Transparency: Vulnerable, honest interactions build trust. We communicate with radical candor.” We must be honest with ourselves and others about what we can and can’t do. If we make agreements, we’ve got to uphold them—the system depends on it. When we don’t keep our agreements, it creates more work, stress, and anxiety for others.



The goal of having agreements isn’t to create an uptight culture or to run people ragged. The goal is to have YOU and everyone else feel good about the role they play in the organization. If you have a clear understanding of what is expected of you, then you easily know when you are “doing a good job”. You can walk away from your work at the end of the day knowing that you upheld your agreements to your team, your patients, the organization as a whole, and yourself.

Within clear, structured agreements, you find satisfaction with your work.

Upholding agreements applies to all of us, and to our organization as a whole. For example, we’ll never ask you to do less than 30-minute appointments, and in return, you have to work with our admin team to ensure you’re hitting the required number of clinical hours.

Provider Name:

Role:

Weekly Schedule: TBD

Type of Patients: TBD

Exclusions: TBD

Patient-Facing Hours Per 40-Hour Week: leave blank

Admin Hours Per 40-Hour Week: leave blank

Intake Appointments: New intakes will be limited to two per day

Administrative time = approximately 20% of your patient-facing/clinical hours (for medical positions). Your administrative time is proportionate to your patient-facing hours. This is particularly critical when taking PTO.

Examples

Normal work week	32 patient hours + 8 admin hours = 40 hours
Half day off	30 patient hours + 6 admin hours + 4 hours PTO = 40 hours
1 day off	27 patient hours + 5 admin hours + 8 hours PTO = 40 hours
2 days off	20 patient hours + 4 admin hours + 16 hours PTO = 40 hours
3 days off	13.5 patient hours + 2.5 admin hours + 24 hours PTO = 40 hours
4 days off	6.5 patient hours + 1.5 admin hours + 32 hours PTO = 40 hours

If you took 1 day (8 hours) of PTO, and for the remainder of the week you spent 3 days patient-facing and spent 1 whole day for admin, you are not upholding your agreements to your patients or to your organization. By not taking admin hours that are proportionate to your patient-facing hours, you are limiting the number of patients that can receive care in a timely manner (Delaying some till other days).

Within your agreements to the organization and to team members, it is asked that you participate in regularly scheduled clinical meetings, team events, and other items as needed and within reason. These items are expected to be counted as part of your admin time, and not as clinical or patient-facing hours.

Performance + Productivity

If there are any issues regarding patient care agreements, the Company's process is to first have a conversation between the supervisee and supervisor, second to have a written counseling, and third to implement a performance improvement plan.



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Personal-Professional Development Plan

Date:

Team Member:

Supervisor:

Goals (Vision)

List the top 3-5 goals that you most want to achieve.

If the above goals are multi-year goals, what are the smaller steps that can be taken toward achieving those goals?

What steps can you take towards achieving the goals in this business quarter?

Inventory: Strengths & Obstacles

What skills do you have that will help you achieve your goals?

List the most daunting aspects of striving for your goals.

What would make your goals seem less daunting?

Network & Resources

List 1-2 individuals that could help you reach your above goals. Think about others who have achieved what you are hoping to accomplish. If you do not have someone in your immediate network to serve as a mentor, reach out to your supervisor or others in the organization to see who they know and ask to be connected.

Are you currently in regular communication with the above individuals? If not, what can others in the organization do to help you connect and build a relationship?

List any additional resources that AIM could provide or facilitate that would help you reach your goal.

Systems and Accountability

What current habits, routines, or systems do you have that support you in meeting your goals?

What habits, routines, or systems do you want to develop to support you in meeting your goals?

Do you have someone helping keep you on track and holding you accountable for your progress?

How can someone at AIM, or the organization, help you stay on track and keep you accountable?

Suggested Resources

Resource List

The Start-up of You
Atomic Habits
BestSelf Journal

Topic

Networking, young professionalism
Habit building, systems for performance optimization
Journaling, goal setting, reflection



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Goal	Mentor	Steps to take this Quarter	Notes / Assistance Needed



121 Sample Meeting Agenda

Reference Materials

Insert link to documents that will be referenced during this 121.

Accomplishments

- What are you proud of accomplishing this week personally?
- What are you proud of accomplishing this week professionally?

Priorities

- What are your current OKRs/Rocks?
- What numbers are you accountable for (KPIs/Scorecard)?
- What is the single thing you could do to add the most value to the organization?
- What projects are you currently working on?
- What's the most important thing for us to talk about?

Blockers

- Who is holding you up internally?
- Who is holding you up externally?
- What isn't working right for you?
- What decision(s) are you struggling to make?
- How can you be better supported personally? Professionally?

Development

- What's next in your career development?
- Who are you meeting with to help you with your individual goals?
- How can the company better support your development?

Feedback

- What should I (manager/supervisor) be doing more of?
- What should I (manager/supervisor) be doing less of?
- What are some behaviors that motivate you/others on the team?
- What are some behaviors that demotivate you/others on the team?

Getting Clear

- Your *actual* priorities for the week.
- What will you do (perhaps differently) to be more effective next week



Quarterly Check-In

Team Member:	Supervisor:
Position:	Date:

Questions	Notes and Follow-up Actions
-----------	-----------------------------

1	What goals and objectives have been accomplished this quarter?	
2	How would you rate your overall performance for the past quarter?	
3	What challenges have arisen that have impacted your ability to achieve your goals?	
4	What goals or projects still need to be accomplished?	
5	Which goals are no longer relevant or high priority?	Follow-up: Should they be revised or removed?
6	What new priorities or projects have surfaced that should be included as new goals?	
7	What resources and support are needed to accomplish the goals that remain for the rest of the year?	

8	What obstacles or challenges might hamper your performance going forward?	Follow-up: Is there anything I can do to assist you?
9	What new knowledge or skills will help you achieve your performance goals?	

Add section for providers with utilization metrics for the quarter

Add section for non-providers on key metrics for the quarter

Team Member Signature: _____

Supervisor Signature: _____



Team Member Performance Review Form

Team Members' performance will be reviewed based on company values, job duties, and competencies by their direct manager. The manager and team member should review the job description for the team member reviewed, during the review period and make updates as appropriate for the forthcoming year.

Team Member Name:
Team Member Title:
Date of Review:

Manager:
Period being reviewed:

Scoring Key:

5 = SUBSTANTIALLY EXCEEDS COMPETENCY: Consistently exceeds requirements of the job. Outstanding performance and exceptional accomplishments.

4 = EXCEEDS COMPETENCY: Surpasses job requirements and expectations.

3 = COMPETENT: Consistently meets requirements and expectations of position.

2= IMPROVEMENT NEEDED: Does not consistently meet job requirements and expectations. No merit increase will be granted to an individual with this overall performance rating.

1= UNSATISFACTORY: Overall work does not meet the minimum job requirements. No merit increase will be granted to an individual with this overall performance rating.

A. Review of Essential Job Functions and Responsibilities.

Please use the following criteria to review the Team Members performance based on 5 Job Functions and Responsibilities as reflected in the team members job description.

	Rating				
1.	5	4	3	2	1
2.	5	4	3	2	1
3.	5	4	3	2	1
4.	5	4	3	2	1
5.	5	4	3	2	1
Part I Score = Sum of Items 1 thru 5, ÷ 5	Total Average				

All Ratings Other Than “3” Should be Commented Upon In Performance Summary Section.	Score =
--	----------------

B. **Company Values Review:** (Review how the Team Member has embraced and lived by the company values in their professional life.)

	Rating
1. Living Centered: Balance in life is achieved through self-awareness. We are mindful.	5 4 3 2 1
2. Transparency: Vulnerable, honest interactions build trust. We communicate with radical candor.	5 4 3 2 1
3. Unity: Human connection fosters well-being. We cultivate meaningful relationships.	5 4 3 2 1
4. Accountability: High standards elevate performance. We rise together.	5 4 3 2 1
5. Growth: Change is the only constant. We improve daily.	5 4 3 2 1
Part I Score = Sum of Items 1 thru 5, ÷ 5	Total Average
All Ratings Other Than “3” Should be Commented Upon In Performance Summary Section.	Score =

C. **Competency Review:**

	Rating
1. Demonstrates independent judgment in crisis situations with emphasis on autonomy	5 4 3 2 1

2. Ability to articulate and execute personal self-care and vocational growth plans.	5	4	3	2	1
3. Excellent oral and written communication skills.	5	4	3	2	1
4. Ability to work interpersonally and motivate clients with co-occurring disorders.	5	4	3	2	1
5. Have the flexibility to respond quickly and appropriately to changing circumstances and clients' needs.	5	4	3	2	1
Part I Score = Sum of Items 1 thru 5, ÷ 4	Total Average				
All Ratings Other Than "3" Should be Commented Upon In Performance Summary Section.	Score =				

D. Overall Performance Evaluation

Instructions: Add the three average scores. _____ is the "Total Score". Circle the range that this number falls in (below), and see the respective "Overall Rating" for the Team Member. Any rating equivalent to "Unsatisfactory" or "Improvement Needed" will require a performance improvement plan.

Total Score	Overall Rating
1 – 3.0	Unsatisfactory
3.1-6.0	Improvement Needed
6.1-9.0	Competent
9.1-12.0	Exceeds Competency
12.0-15.0	Substantially Exceeds Competency

- **Check box if Performance Improvement Plan is indicated**

E. Performance Summary and Goal Setting:

- ✓ Anything rating below a 3 needs to be commented upon in this section
- ✓ What are the Team Members primary strengths as they pertain to their job functions and responsibilities?
- ✓ What opportunities exist for Team Member development?
- ✓ Identify new behaviors and actions that should be established or enhanced.
- ✓ Also, identify any behaviors that should be stopped because they adversely impact performance.

Summary:

- ❖ What are at least 3 Team Member development goals you would like the Team Member to develop over the next year? Please use a SMART goal format.

SMART Strategic Goal
(Specific, Measurable, Achievable, Relevant, Time Bound)

	Projected completion date
1.	
2.	
3.	
4.	
5.	

F. Team Member Feedback:

1. What did you accomplish during the past year?
2. How can you improve?
3. How can Green Hill support your growth personally and professionally?

4. General comments on the review.

Team Member Signature: _____

Date: __/__/__

Manager Signature: _____

Date: __/__/__



Performance Management System

Overview:

Progressive performance improvement is a method of improvement that uses graduated steps for dealing with problems related to a team member's conduct or performance that do not meet clearly defined standards and policies. The ultimate objective of progressive performance improvement is to help team members correct conduct problems and resolve performance issues in the earliest stages. Using a progressive performance improvement system:

- Provides a consistent, objective, and fair process for improvement performance
- Promotes open communications between a supervisor and his or her team member
- Improves team member productivity
- Potentially increases team member retention by resolving issues
- Provides important documentation should termination become necessary

It is important to note that although the progressive performance system is generally followed in consecutive steps, it is up to the discretion of management and leadership to escalate performance action to a higher severity if the infraction warrants it. It is imperative that HR is notified of and involved in all progressive performance improvement steps taken so that it can be properly documented. Having this interdepartmental collaboration also ensures that proper protocols are followed.

Actionable Steps:

1. Verbal Warning For a first offense where the infraction is minor, an oral discussion is usually appropriate. The team members' supervisor should inform them of the infraction and clearly advise them both of the conduct expected and that future infractions may result in more severe improvement. The supervisor needs to send a follow-up email to the team member recapping what you went over to ensure that we have documented proof in case it is needed. Be sure to forward a copy of the email to HR so that it can be filed in the team member's personnel file.

- Email template linked [here](#)

2. Written Warning Another step in the progressive performance improvement system is the written warning, which usually follows an unsuccessful verbal warning, or when new/bigger problems arise. This document should clearly state the infraction and the consequences for a repeat offense. It should also reference the previous verbal warning and email follow up, if one

was provided. The written warning should be addressed to the team member and a copy should be given to HR so that it can be filed in the team member's personnel file.

- Printed form template linked [here](#)

3. Performance Improvement Plan A PIP should be used when a team member's performance falls below the expected standards or when specific areas of improvement are identified. It is typically implemented as a means to help employees enhance their performance and meet the required objectives. PIPs are commonly utilized in situations where coaching, feedback, and informal performance management methods have not yielded the desired results, and a more structured approach is needed to address performance issues.

- [Linked here](#) is the Performance Improvement Plan template

3. Termination The decision to terminate a team member is never easy and should be made by the team member's supervisor with approval from Nick Slovak or Tripp Johnson. The decision should never be made by a single person. A termination letter is not required and isn't advised. The conversation should be in-person and a witness must be present, such as HR or leadership, such as Nick or Tripp. If a severance package is going to be offered, please be sure that HR provides you a [separation and release agreement](#). HR needs to be involved in this process, so when this decision has been made it's imperative that they are notified immediately.



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Dear [Recipient],

I wanted to follow-up with you after our recent meeting on [DATE] to reiterate some of the key points we discussed. As we discussed, there are areas in which I need you to focus your attention in order to improve. To that end, I would like to outline some of the key steps we agreed upon during our meeting that will help you improve:

1. Clearly identify the specific areas that require improvement.
 - a. List area that needs improvement
 - b. List area that needs improvement
2. Develop a plan of action that addresses the specific areas of concern.
 - a. List expectation
 - b. List expectation
3. Communicate clearly and openly with each other to ensure we stay on track.
4. Regularly review our progress and make adjustments as necessary.
 - a. Follow up on: DATE
 - b. Should things not improve by DATE, we may have to discuss alternative courses of action regarding your role within our organization

I believe that by working together and focusing on these key areas, we can make significant progress. I am committed to supporting you in this process and to working collaboratively to achieve the desired results.

If you have any questions or concerns, please do not hesitate to reach out to me. I am here to support you and help you succeed.

Sincerely,

[Your Name]



Written Counseling Form

Date: _____

Team Member's Name: _____

Previous Written Counseling Dates (if any): _____

Purpose of this session:

- | | |
|--|--|
| <input type="checkbox"/> Attendance related | <input type="checkbox"/> Falsifying records |
| <input type="checkbox"/> Performance related | <input type="checkbox"/> Violation of policy |
| <input type="checkbox"/> Behavior related | <input type="checkbox"/> Other (explain below) |

- 1. Describe the event(s) (include evidence, witnesses if appropriate and team member's response):**

- 2. Describe any prior discussions on this subject/approximate dates, verbal or written (or N/A):**

- 3. Describe behavior's impact on individuals, team members/departments, customers, or organization:**

- 4. Describe the next steps/dates (expected behavior, performance goals, training completion, etc.):**

- 5. Consequences of failure to correct behavior:**

Notice To Team Member:

It is expected that the behavior noted above will be corrected as stated and/or that you will immediately perform all aspects of your responsibilities at a satisfactory level. Further disciplinary action, up to and including termination, will result if you fail to correct the noted behavior or perform your duties in a satisfactory manner whether or not those behaviors and/or responsibilities are noted above. Please see our corrective action procedures for more information. If you have concerns related to this corrective action, address it through our normal communication/reporting procedures.

Team Member Acknowledgement:

My supervisor has discussed the above with me. My signature is intended only to acknowledge receipt of this notice; it does not imply agreement or disagreement with the notice itself. If I refuse to sign, someone in a supervisory position within the organization will be asked to initial the form indicating that I received a copy of this form. If I have any comments or responses to this written warning, I will note them below.

Team Member's Signature: _____

Supervisor's Signature: _____

Team Member's Comments:



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Performance Improvement Plan

Team Members Name:

Supervisors Name:

Date:

Reason for improvement plan

The purpose of a performance improvement plan is to provide a structured framework for team members to enhance their performance, address any performance gaps, and ultimately succeed in their role.

Performance improvement plan

As discussed, this document serves to provide you with a plan to correct your performance in the following areas:

- Issue #1: You are expected to [company expectation].
 - [Explanation of how the employee failed to meet this expectation]
- Issue #2: You are expected to [company expectation].
 - [Explanation of how the employee failed to meet this expectation]
- Issue #3: You are expected to [company expectation].
 - [Explanation of how the employee failed to meet this expectation]

Action items to correct performance

To correct performance, you must complete the following activities within [timeline (e.g., 30, 60, 90 days)]:

- [Specific improvement goal]
- [Specific improvement goal]
- [Specific improvement goal]

By following this action plan, we are confident you will be able to improve performance and meet the expectations of Advaita Collective.

If you are unable to meet the above expectations by [deadline], you will be subject to disciplinary action up to, and including, termination.

I have reviewed the above information with my supervisor and have a clear understanding of the expectations that are laid out in this performance improvement plan.

Team Member

Signature: _____

Supervisor: _____

Performance Improvement Policy

Overview:

We believe that open communication between you and your supervisor can provide the basis for resolving any problems associated with your behavior or performance. **The Advaita Collective** does not have a formal improvement process but will take any action necessary depending on the facts of each situation. Nonetheless, at **the Advaita Collective**, performance improvement is not intended to punish, but to help the team member understand and correct their behavior. Improvement actions may entail verbal warnings, written warnings, performance improvement planning and termination. Not all of these actions may be followed in all instances. The company reserves the right to exercise discretion. A prior warning is not necessarily a requirement for termination. All actions will be documented; documentation will be placed in personnel files.

Actionable Behaviors:

The company reserves the right to take any action the company considers appropriate, including termination, at any time. Listed below are some examples where immediate termination may be warranted. This list is general in nature and is not intended to be all-inclusive:

- Discourtesy to a customer, vendor, or the general public resulting in a complaint or loss of goodwill
- Refusal or failure to follow directions from management; insubordination
- Breach of confidentiality relating to employer, employee, customer, or vendor information
- Altering, damaging, or destroying company property or records, or another employee's property
- Dishonesty
- Providing false or misleading information to any company representative or in any company records, including the employment application, benefits forms, time cards, expense reimbursement forms, and similar records
- Fighting or engaging in disorderly conduct on the company's or a customer's premises or off-site while representing the company
- Violations of any of the company's employment policies including, but not limited to, confidentiality, security, solicitation, insider trading, conflict of interest, and code of conduct
- Conduct or performance issues of a serious nature
- Failure of a drug or alcohol test