

DOCUMENTATION MEMORANDA EXERCISE

Goal: To develop a written memorandum for documentation purposes on personnel matters.

Objective: The student will write a summary memorandum for documentation purposes.

Premises:

- 1) Memoranda provide both parties with a common understanding of the incident or issue.
- 2) A well-written memorandum provides documentation that transcends time and will withstand judicial review.

Input:

There are different types of memoranda:

- 1) Memorandum to file - A record of a minor problem, which involves a teacher or other employee.
- 2) Specific incident memorandum - A principal observes an incident or has a complaint from a third party and thus sends a teacher a memorandum regarding the incident/complaint.
- 3) Visitation memorandum - A summary of a classroom visit by the principal or supervisor.
- 4) Summary memorandum - An outline of the results of several incidents and/or classroom observations.

It is good practice to precede a memorandum with a personnel conference to establish the validity of the content of the documentation.

A well-written memorandum will adhere to the following format:

- 1) Specifies to whom memo is being sent.
- 2) States who is sending the memo.
- 3) States the subject matter of the memo.
- 4) States date of the memo.

Example:

TO: Joe Know-It-All
 FROM: Paul Principal
 RE: Classroom Visitation
 DATE: January 14, 20_

The memo content should be:

- 1) Factual
- 2) Job specific
- 3) Dated as to when incident/observation occurred
- 4) Prepared in the first person (You and I)
- 5) Non inflammatory and/or non judgmental
- 6) Signed by preparer of memo

In certain situations, it may be necessary to ask the teacher to sign the memo, acknowledging receiving and reading the memo. The signature of the teacher does not necessarily mean that the teacher agrees with the content of the memo.

Activity:

Write a summary memorandum based on the following memoranda on file:

Teacher:	Mr. Know-It-All
School:	Anywhere High School
Grade:	9th
Subject:	History
9/20/2_	Did not sign in upon arriving at school 8:20 - 15 minutes late (Principal)
9/25/2_	Did not show up for faculty meeting (Principal)
9/30/2_	Did not turn in lesson plans till Tuesday p.m. (Secretary)
10/5/2_	Did not show up for lunchroom duty as assigned (Assistant Principal)