

# Probation checklist for Line Managers

## Beginning of Probation

- Hold initial meeting with probationer and explain to them the following points:
- The duration of the probation;
- The standards of performance the member of staff is supposed to attain over this period;
- How their performance is going to be assessed.
- The result of not meeting the standards required.
- Provide probationer with written copy of the explanation of the above points and ask them to sign that they have understood what is asked of them.

## During Probation

- Carefully monitor probationer's progression in post.
- If probationer has already achieved criteria set out, apply to Human Resources for early conclusion of probation.
- If the probationer is progressing as normal hold a formal meeting with them at the half-way point of their probationary period. The purpose of the meeting is to review the performance of the probationer. They may be accompanied by a trade union representative or work colleague at that meeting.
- A record of this meeting should be kept and included in the report on the probation.
- If the probationer shows signs of difficulty in fulfilling criteria, inform the relevant HR Partner and hold meeting with probationer as soon as possible. They may be accompanied by a trade union representative or work colleague at that meeting. At meeting inform them of:
  - What the problems are,
  - What improvement is necessary,
  - What can be done to assist them in meeting the performance level required.
- Keep a record of the meeting.
- If these problems persist, repeat meeting and clarify points.

# End of Probation

Six weeks before the end of probation, Human Resources request a report on whether the probationer's employment should be confirmed or not.

Assess whether the probationer has:

- Satisfied the requirements for continued employment and that as a result the employment is confirmed;
  - Satisfied the most significant requirements, but there is a need to continue probation for a set period, normally up to a further three months.
  - Not satisfied the requirements and the employment is terminated. [In this situation the probationer has the right of appeal to the Director of Human Resources.]
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- The Line Manager should inform the Head of School or equivalent of the conclusions of the assessment. The results of the assessment should then be communicated to the probationer in a meeting if probation is to be extended or employment terminated. The probationer should be given a copy of assessment's conclusions. They may be accompanied by a trade union representative or work colleague at that meeting. The results of the assessment should be communicated to the relevant HR Partner.

# Staff Development Review

- Hold SDR meeting once probation is completed to agree performance standards for the following year and assess any further training needs for the member of staff.