

Probationary Review Document

Considerations for Managers/Reviewers

Before the meeting...

- Ensure ongoing dialogue takes place from the date of hire to the review date to ensure there are no surprises for the employee during the meeting. Take time to understand why performance is successful, or why it may need development. Document and address these items as they come up so you are able to back up feedback using explicit examples.
- Inform the employee about the upcoming probationary review meeting well in advance; ensure a minimum of one hour of uninterrupted time is booked for the meeting.
- Ensure you have planned to meet with the probationary employee a minimum of twice in their probationary period to review their progress. This document can be used for each review; if this is the second probationary review using this document, compare the last document with this one to consider the progress, whether the goals have been met etc.
- Give the employee the self assessment document to complete two weeks before the review date and have them return it to you one week prior to the review date in order to give you an opportunity to review prior to the meeting.
- Collect any notes you have made relevant to performance and any feedback received. Consider the duties in the job description and determine whether the employee has been successful in taking on the duties as planned. Ensure a copy of the job description is available during the review meeting for reference.
- The checkboxes are there for clarity and the box you check should be reflective of the comments and examples you have provided in the relevant competency.
- If there are concerns as to whether the employee can meet the fundamental requirements of the position, please ensure you contact your HR Advisor prior to holding the review meeting.**

During the meeting...

- Reserve a quiet (no interruptions), private space and ensure the employee feels comfortable.
- Review the employee's completed self-assessment document together to ensure their viewpoints are incorporated and discussed. Ensure there is discussion regarding the questions answered by the employee in the self assessment.
- Give the employee a copy of the performance review and plan document to facilitate the conversation. Go through the document with the employee using it as a conversation guide to ensure feedback is given in each competency area.
- Discuss the progress to date, the remaining training needs, roadblocks that may exist, future development opportunities etc.
- Set measurable goals and objectives that focus on the remaining needs to ensure the employee is successful in their probation. Ensure goals are agreed upon and expectations are understood.

Some tips for providing constructive feedback...

- Focus on specific rather than general work behaviours – general statements can be vague and provide little useful information, especially if you are attempting to correct a problem.
- Keep comments impersonal and job related
- Support the feedback with examples – it helps the employee to identify specific behaviours.
- Let the employee speak – they may have valuable insight into the challenges they face. You should also be open to feedback, as you may have to adjust your management style to support the employee.
- Ensure the employee has a clear and full understanding of the feedback.
- Detail a plan of action that the employee is responsible for and ensure they understand what improvement (if any) is needed.

After the meeting...

- Review the document, adding any additional comments from the meeting and give the employee a copy. Ensure the employee is given a copy of the optional comment sheet for completion if desired.
- Place a copy of the signed probationary review document in the department employee file.
- Discuss a time for the second probationary review meeting (if this is not already the second review).
- Once the employee has passed their probation, the intention is for the manager to utilize the performance review and plan document at the next review date.
- Follow up regularly, checking in on completion and progression of goals and keep your word around items discussed in the review (such as training for the employee).