

Appendix 2.

Undertaking a probationary review - Advice for line managers

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Introduction

This guide helps you, as the manager, to understand how to undertake a probationary review. Where employees are not performing to the desired level, or their behaviours are not what you deem appropriate, and they are within their probationary period you should take advice from the HR Advice Team for support and guidance.

The purpose of the probationary review

No matter how rigorous the recruitment process, until somebody starts within a role, it is difficult to determine their absolute suitability. The probationary period is in employment contracts in order to allow the employer and the employee to check that this is the right job for them as it offers more flexibility to the employment relationship.

By undertaking and documenting regular reviews throughout this period, you can address any concerns and offer feedback as to how the employee can improve in order to address this. It is also an opportunity to discuss any training that may be required and for this to be planned in, along with any tasks which are either general or mandatory as part of an induction and whether these have been completed. In addition, this gives you an opportunity to sit down and formally check in on the employee's wellbeing.

The reviews should take place when an employee is doing well or not.

What should we discuss?

Progress meetings will be planned and scheduled, within ERP, at the outset of the employee's employment. It will be the line manager's responsibility to ensure that all probationary reviews are completed on time. It is the employee's responsibility to engage in the process.

At each meeting, the manager should aim to:

- Highlight areas where the employee is doing well

- Explain clearly and in precise terms any areas in which the employee is falling below the required levels of performance and how they can improve
- Explore the possible reasons for any failure to meet the required standards (as set out in Appendix 1)
- Discuss and agree whether or not any specific training or coaching is required
- Discuss any other relevant matters such as timekeeping, attendance, general conduct or attitude, how or why this is not acceptable and what improvements you expect
- Discuss any health and safety, equality and diversity issues including any on disability
- Invite the employee to comment on issues such as the extent to which they have integrated into the department and how well they have been getting on with colleagues
- Give the employee an opportunity to ask questions or raise concerns about any aspect of their employment.

How should this be recorded?

Each review meeting will be documented in detail using ERP at the time of the meeting, with input from both parties and should accurately reflect the conversation which takes place.