**Human Resource Management**

**Checklist for review and probationary meetings**

Ensure you have read and are familiar with the details in the company’s **Recruitment and Induction Policy** before the meeting.

Employee Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Role in the company: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |  |
| --- | --- | --- |
| **Pre-Meeting Action.** | **1 Months** | **6 Months** |
| **Done/ discussed** | **Done/ discussed** |
|  | Arrange and book the 1-month and 6-month review meetings with the employee – book these in when they start in the role.  |  |  |
| 1.
 | For the 1 and 6-month review ensure you invite the employee in writing and representation is offered (staffing handbook) |  |  |
|  | Ensure you have a copy of the first PDP, and that it is up to date following all previous review meetings (including 1-month review and subsequent reviews) |  |  |
|  | Ensure that a copy of the employees job description which sets out competencies, task based training records, mandatory training dash board etc. |  |  |
|  | Ensure you have details of any concerns or positive comments you may have e.g., behavior, attendance, performance etc. |  |  |
|  | Ensure that the employee has prepared for the review, i.e. what they think has gone well, not so well, any concerns they may have, or details of any support they may need (including any requested, and they have not received) |  |  |
|  | As part of your preparation, should you have any concerns or questions prior to the meeting please discuss them with your company’s HR advisor  |  |  |

**PROBATION / REVIEW MEETING TEMPLATE**

**INSERT NAME OF COMPANY (EMPLOYER)**

**OUR MISSION AND VISION**

Provide a short three liner on the core objectives of the company.

**Employee Name:**

##

Role in the organisation:

Date of commencement:

Date of review meeting:

Review meeting team:

Offered permanent position with the company subject to funding offered Yes / No

**INTRODUCTION**The purpose of the probationary review meeting is to provide an opportunity for meaningful dialogue between the line manager or designated person and your centre manager, to agree your key Performance Objectives in line with our organisational strategy, determine learning requirements for the upcoming period and to identify your accomplishments during the performance period. Two members of the staffing subgroup i.e. the employees direct line manager and another appointed person by the sub group will meet with the employee. Those people should be made known to the employee in advance of the meeting. (This is recommended practice, but amend as per the capacity of your Board of Management)

The employee self-evaluates his or her performance against the agreed Performance Objectives and returns the completed form to the line manager / designated person prior to the probationary meeting. This form helps the employee to know what will be discussed and to help keep the meeting focused. The line manager / designated person evaluates the employee’s performance against the agreed Performance Objectives and then meets with the Employee, and together they review performance for the probationary period, complete the overall comments section, sign and date the form. Any obstacles to the achievement of objectives are also explored and reviewed. If the line manager / designated person is satisfied that all of the required criteria has been met the probationary period will cease.

**Planning:** a key outcome of the performance review process is to set new objectives for the coming year, agreed by both employee and line manager. It is also an opportunity to identify extra skills, knowledge, or support the staff member may need to achieve their new objectives and/or any additional responsibilities for the future.

**Process:** the review is part of the on-going Support and Supervision process which the company prioritises for each staff member.

**Confidential:** all Review discussions and documents will be treated with the strictest confidence

**Responsibilities:** both the employee and the line manager / designated person to undertake to give due time and attention to the process.

**SECTION 1: REVIEW OF PREVIOUS WORK / PERFORMANCE**

(Employee to complete this section and return to your Manager prior to the review)

1. General overview of work during the review period

**Comments:**

*(Employee to complete this section prior to review meeting)*

Outline the key work you have delivered / your achievements over the last review period with the company:

|  |
| --- |
|  |

Outline your key learning during this period

|  |
| --- |
|  |

Describe any challenges you have encountered / Was there anything that hindered you in the achievement of your work objectives during the review period?

|  |
| --- |
|  |

How would you rate your skillset – technical and otherwise – against the requirements to be effective within your role?

|  |
| --- |
|  |

What areas of your role do you think you could improve on?

|  |
| --- |
|  |

What supports do you require to effectively deliver upon these work objectives? (e.g. further training or support)

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| --- |
|  |

Expand on questions are required

**SECTION 2: INDIVIDUAL OBJECTIVES – PLAN & REVIEW**

(to be completed by line manager / designated person and centre manager during the meeting )

|  |  |  |  |
| --- | --- | --- | --- |
| **Performance Objectives** | **Support/Training Needed** | **Actions – I will achieve** **my objectives by** | **Desired outcome**  |
| [Insert key Individual Objective] | [Insert support needed] | [Insert Individual actions to be taken] | Insert desired outcome  |

Insert more rows as required.

**The review process has been completed to the satisfaction of both parties (undersigned below)**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature: **Employee** being reviewed, to indicate they agree with the review

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature: Person conducting review: **Line Manager / designated person**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date

|  |  |  |
| --- | --- | --- |
| **Review Meeting** | **Done/ discussed** | **Done/ discussed** |
| **1.** | Confirm the reason for the meeting is to review how the employee’s induction and first PDP (Professional Development Plan) is going. Explain that this review is to ensure that they are on track to achieve their probation by the end of the 6-month period.  |  |  |
| **2.** | Ask the employee to describe how their first 1/5 months have been, what has gone well in their view, what perhaps has not gone as well. Ask them to identify any gaps in their PDP, and what support they may need or have already requested – what support do they need from you to get this done. For the 6-month review, build on the comments from the 1-month review and subsequent reviews. |  |  |
| **3.** | Ask about relationships within the team – how are they getting on with others? What support do they need from you/others? Have the actions from the 1-month meeting been carried out? Should there be any issues, these must be addressed (refer to the Dignity at Work policy and or HR Direct for further guidance) |  |  |
| **4.** | Ask about their wellbeing. What support do they need from you/others? Have the actions from the1-month meeting been carried out? |  |  |
| **5.** | Ask about their work life balance. What support do they need from you/others? Have the actions from the 1-month meeting been carried out? |  |  |
| **6.** | Review positive/ negative behaviour you have witnessed. You MUST provide specific examples. When addressing negative behaviour, this should be carried out immediately, and should not wait for the review. Therefore, you will be able to focus on the changes made etc. |  |  |
| **7.** | Review any absence if applicable. Make them aware of the attendance expected, - if you have already done this, at a return to work, do it again.If you have made any allowances for absence already, i.e. given them longer to complete a task, you must record this in the PDP and notes from this meeting |  |  |
| **8.** | Review Mandatory Training and any Task based training, workbooks etc. Identify any gaps and record actions in the employee’s PDP |  |  |
| **Choose the relevant options below depending on your employee’s progress** |
| **9.** | Confirm that you are satisfied with their progress and that you will be confirming they have passed their probation at the 6 months point. Explain that any inappropriate conduct or absence could still impact this decision up to the end date of their probation period OR |  |  |
| **10.** | Extension to Probation (See policy of where this may be appropriate). Confirm that you are happy with their progress to date; however, some areas still need to be addressed before you can confirm their successful probation. Therefore, another review will be held. Provide detailed reasons for this, update their PDP, and include in the OUTCOME letter. \*Arrange a further review meeting. Explain that they must achieve the actions/standard required, or they risk a decision to refer their case to a Final Review Meeting to consider dismissal on grounds of failing probation. \***OR****\*probation can be extended by any length of time up to a maximum of 3 months** |  |  |
| **11.** | Confirm that despite best efforts, they have not achieved the standard required, and this could not be expected to be achieved, therefore, their case will be referred to a Final Review Meeting where a possible outcome may be dismissal on grounds of failing probation. (See Capability Policy for process) |  |  |
| **Post Meeting Action;** | **Done/ Discussed** | **Done/ discussed** |
| **1.** | Send the outcome letter of the meeting to employee (use template provided by your HR advisor)  |  |  |
| **2.** | Ensure that the PDP is updated, and provided to the employee, and that they take ownership for completing any actions, and remaining induction requirements. Ensure that you make provision for any support you have promised whether this is from others or yourself. Ensure this is delivered. |  |  |

Top tips

* All staffing related matters should be confined to the staffing subgroup. The board should be cognisant at all times of GDPR and remaining impartial.
* If you have a HR company on a retainer, it is essential that you don’t go off yourself and do your own thing they are being paid a retainer and as such should be expected to advise on all matters contained in the service contract.
* Where there is no HR company the board should ensure that they are confident that there is someone with adequate experience / suitably qualified on the board to advise and guide on HR issues.
* Remember to document everything always have a paper trail