# Probation Review Form

Before completing this form you are advised to read the [University’s Probation Policy & Procedure](https://www.york.ac.uk/admin/hr/policies/new-starters/probation-policy/).

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| **Title and full name** |  |
| **Department / section** |  |
| **Line Manager** |  |
| **Date of appointment** |  |
| **Grade** |  |

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| --- | --- | --- | --- |
|  |  | Date due: | Tick once completed: |
| Initial Meeting |  |  |  |
| 3-month review: |  |  |  |
| 6-month review: |  |  |  |
| 9-month review: *(grades 6-8 only)* |  |  |  |

## Part 1:

**This section should be completed by the line manager within a week of the employee commencing their employment:**

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| Section A: Objectives The line manager should identify specific objectives for the employee, linked to the areas of work performance identified in parts 2 and 3 of this form. These will be statements of what should be achieved during the probationary period, including indicators of success and timescales for achievement. |
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| Section B: Development Plan To support the employee in achieving these objectives, the line manager should identify any training and development needs and specify how and when these needs will be addressed during the probationary period. |
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| **Employees Signature:**  **Managers Signature:**  **Date:** |  |

## Part 2:

**First review - 3 months and Second review - 6 months *(where applicable.)***

**To be completed by the line manager in discussion with the employee.**

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| **Work Performance Objectives** | **Objectives Met** | **Objectives Partly Met** | **Objectives Not Met** |
| Quality |  |  |  |
| Efficiency |  |  |  |
| Commitment |  |  |  |
| Working Relationships |  |  |  |
| Attendance and Timekeeping |  |  |  |

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| **If any of the above areas require improvement please provide details below:** |
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| **Where concerns have been identified, please summarise how these will be addressed during the remaining period of probation.** |
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| **Summarise the employee’s performance and progress over the period.** |
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| **Have the objectives identified for this period of the probation been met?** | **YES**  **NO** | If no, what further action is required? | Review Date: |
| **Have the training and development needs identified for this period of the probation been addressed?** | **YES**  **NO** |  |  |
| **Employee’s Signature:**  **Manager’s Signature:**  **Date:** |  | | |

## Part 3:

**Final Review – 6 or 9 months depending on the grade of the employee.**

**To be completed by the line manager in discussion with the employee.**

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| **Work Performance Objectives** | **Objectives Met** | **Objectives Partly Met** | **Objectives Not Met** |
| Quality |  |  |  |
| Efficiency |  |  |  |
| Commitment |  |  |  |
| Working Relationships |  |  |  |
| Attendance and Timekeeping |  |  |  |

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| **Summarise the employees performance and progress over the period** |
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| **Is the employee’s appointment to be confirmed?** | **YES NO** |
| If NO, please provide reasons below and summarise what action has been taken to address any difficulties which have arisen during the probationary period. | |

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| **Should the employee’s probationary period be extended?** | **YES NO** |
| If YES, please provide reasons and, where appropriate, specify any areas of improvement required and how these will be monitored. | |

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| **Length of extension (up to 3 months):** |  |
| **New Probation Period completion date:** |  |
| **The employee may provide any comments about their experience of the probationary process here.** | |
| **Employee’s Signature:**  **Manager’s Signature:**  **Date:** |  |

## Objective Setting Guidance

Guidance on [Objective Setting](https://www.york.ac.uk/admin/hr/performance-management/setting-targets/agreeing-objectives/why/) can be found on the HR webpages by clicking on this link.

There is also some guidance below on the work performance areas which are assessed during the probationary period.

**Quality**

This performance objective is to measure the standard of work produced by the individual. Indicators of good quality work may include a high level of accuracy, well-constructed and formatted, concise and compliant with legislative and policy requirements.

**Efficiency**

This performance objective is to measure how well an individual manages their time, whether deadlines are met and the speed within which work is produced.

**Commitment**

This performance objective is to measure the overall level of engagement demonstrated by an individual. Indicators of good commitment may include an individual voicing ideas, input at team-meetings and demonstrating an interest in the wider University agenda.

**Working Relationships**

This performance objective is to measure how effectively an individual embeds themselves within a team and/or how well they deliver a service to customers/stakeholders.

**Attendance and Time keeping**

This performance objective is to measure an individual’s physical presence at work, punctuality and their compliance with the relevant University policies such as sickness absence reporting and flexitime.