

Form - Employee - Probationary Review

Employee Name	
Manager Name	
Meeting:	

Objective

Every workplace is different, and employees work much better when they are clear on expectations. It is unreasonable to expect that a transition into a new role will go brilliantly or without its challenges. People are a product of their previous environment, so what may have been common practice in another environment, may not be here at Headway. So it's important to have a regular, honest dialogue to ensure an employee's success and the business's greatest benefit from their new employee.

The objective of reviews during the Probationary Review period is to keep communication flowing and address any concerns, teething problems, training or accountability issues and provide clarity on priorities, early, rather than leaving everything to the end of the probationary period. Its expected that the 3- and 6-month reviews are formal milestones of a much more regular consultation between manager and employee, and should not be filled with surprises. It is an opportunity to adjust the way things work and unlock barriers for all.

We want our Employees to feel positive and focused about their contribution, this leads to a happier, more settled employee and a productive workplace at Headway.

Purpose

The purpose of this meeting is for the employee and the Manager to discuss the period of employment to date and to highlight any areas that may need to be addressed. This may be a simple clarification of duties, access or tools needed to perform the duties and possibly, training considerations both immediate and long term that need to be discussed. Meetings must be documented and shared with the employee on completion. Signed copies must be stored on the employee file prior to the 3 and 6 month employment dates.

Typical examples of discussion points and feedback in these reviews include;

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- Planning, or lack of
- Communication
- Positive attitude
- Work load
- Expectations and deliverables
- Training
- Retention
- Presentation
- Follow through
- Attention to detail
- Adherence to deadlines

The employee will have an opportunity to communicate how they feel they are performing within the guidelines given for the role. We will discuss what areas are enjoyed, what areas if any, are proving difficult, expectations and accountability. This is also an opportune time for the team member to discuss whether the role is as described during the interview process.

The Manager will then give feedback on how the team member is performing to our expectations and document improvement Action Plans if required.

Process Format

- Book a time and advise the Team Member of the meeting and the purpose. Allow approximately 45 minutes – 1 hour.
- Send the employee the probationary review document when booking the meeting
- Prior to the meeting, invite the employee to talk/write about their role openly covering the items in the form, and any issues they may have and any improvements that they have made.
- Team Member to send the Manager their initial notes in this form. Manager to prepare questions and points for discussion. At the meeting, Manager gives feedback on performance, amends and notes discussion, as well as any issues raised or actions to be taken. Highlight any relevant issues with examples and actions/outcomes.

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- Discuss appropriate training, retraining, refocus and appropriate time lines.
- It is important to include expected milestones against each responsibility in the Job Description for the probation period.
- Advise an appropriate date to revisit the above and review monthly in your catch ups and formally in these activities.
- This should feel like a mutually constructive session – with clear expectations on both sides, so follow through is really important

Document the action plan and ensure the Team Member receives a copy within two working days of the meeting. Signed copy to be provided to HR to store electronically on employee file.



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Employee Name	
Manager Name	
Meeting:	
Review Type	<input type="checkbox"/> 3 month <input type="checkbox"/> 6 month

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Discussion Point	Employee Notes	Manager Notes	Outcome Action
<p>Review the Position Description – Does it generally provide an accurate description of the role? Are there any points in the PD that require clarification or change?</p>			

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Discussion Point	Employee Notes	Manager Notes	Outcome Action
What are you proudest of during your time here thus far?			

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Discussion Point	Employee Notes	Manager Notes	Outcome Action
In what areas of your role could you improve?			

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Discussion Point	Employee Notes	Manager Notes	Outcome Action
<p>Do you have any concerns about your job or blockages that prevent you from succeeding? (Tools, access, authority, external issues)</p>			

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Discussion Point	Employee Notes	Manager Notes	Outcome Action
<p>How have you found your induction and onboarding experience?</p> <p>Is there anything you feel you don't know about your employment at Headway?</p>			

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Discussion Point	Employee Notes	Manager Notes	Outcome Action
<p>Communication - Do you feel you receive regular, clear communication and instruction from your Manager?</p> <p>Do you feel the style of management used by your Manager is helpful to you?</p>			

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Discussion Point	Employee Notes	Manager Notes	Outcome Action
<p>How do you feel about your interaction with other team members? Is there a better way to work together?</p>			

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Discussion Point	Employee Notes	Manager Notes	Outcome Action
<p>Tell us about your experience overall at Headway thus far.</p> <p>Do you feel you have a good understanding of our organisation?</p>			

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Discussion Point	Employee Notes	Manager Notes	Outcome Action
<p>Are there any areas that you need to retrain, refocus or where you require clarity?</p> <p>Managers, are priorities being attended to?</p>			

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Discussion Point	Employee Notes	Manager Notes	Outcome Action
<p>Looking at our Policies and Code of Conduct, how do you feel you are performing expected behaviours and tasks at Headway?</p> <p>(e.g. On time attendance, Reliability, Accountability, Outcomes, Teamwork, admin, timesheets and work outputs)</p>			

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Discussion Point	Employee Notes	Manager Notes	Outcome Action
<p>Is there any training (informal or formal) you wish to discuss?</p> <p>*This may be incorporated into future planning discussions</p>			

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Discussion Point	Employee Notes	Manager Notes	Outcome Action
<p>What would your goals be for the next six months in your current role?</p>			

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Discussion Point	Employee Notes	Manager Notes	Outcome Action
Are there any other items you wish to discuss as part of this probationary review?			

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Actions noted here as a result of the meeting are to be summarized in this table (Above) and shared with the team member, with clear examples and measures (timelines and expected outcomes). Managers, commitments made by you are of equal importance and should be attended to as a priority. Each party must sign the document, which is stored on the Team Member's file and provided as a copy to the employee for action.

Manager

Have there been any incidents, behavior management actions or disciplinary issues to date, please note even if resolved.

Recommended to proceed to next review/beyond probation: Yes No



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Employee

Name

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Signature

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Date

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Manager

Name

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Signature

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Date

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