Managing The Probation Process
Managing Probations

What is the purpose of a probation period?
- To evaluate the performance of new staff
- To ensure the probationer is the right person for the post and possesses the skills and competencies to do the job to the required standard
- Formal reviews are required during the period relevant to the length of probation

How long does the probation period last?
- Non Clinical Lecturer – 3 years*
- Non Clinical Senior Lecturer – 6 months*
- Clinical Lecturer – 1 year*
- Clinical Senior Lecturers – 5 years*
- All other staff – 6 months

* This group of staff do not have a probationary period but are subject to a formal Training and Development Review Period
Your Responsibilities

- Make the requirements of the job clear
- Identify any training and development requirements of the new role
- Ensure that the member of staff has appropriate support and training for the new job
- Ensure regular meetings are held to:
  - Discuss performance and give feedback, advice and guidance on progress
  - Identify any problems and ways to resolve these
  - Record and agree any actions from these meetings so that actions to address the problems are clear.
Mid Probation Review

- Applies to all staff other than those Academic staff who are subject to a Training and Development Review Period.

- Using the **Mid and Final Probation Review form**, you should discuss the probationer’s performance using the questions on the form to guide your discussion.

- Give the probationer feedback on their performance, and advice and guidance on how to progress in their role.

- If there are any issues with the probationer’s performance these need to be raised at the meeting, and an agreed course of action to address the issues put in place.

- Return the completed form to your HR representative. If you have any concerns regarding the probationer’s performance at any point within the probation period, please contact your HR representative immediately.

*If there are issues with the probationer’s performance, these should ideally have been raised in previous informal meetings.*
Final Probation Review

- Applies to all staff other than those Academic staff who are subject to a Training and Development Review Period.

- Similarly to the mid probation, you should use the Mid and Final Probation Review form to guide your discussions with the probationer.

- If previous concerns have been raised you should discuss the probationer’s performance on these tasks and whether they have achieved the expected level of performance.

- If they have not met the expected level of performance you should contact your HR representative immediately to discuss.

- If the probationer has attained a satisfactory level of performance you should confirm the end of probation date with them and return the completed form to HR. If no form is received, HR will automatically confirm the individual’s probation.