**Managing Probationary Periods**

Most organisations set a probation period for new starters; they can vary between three months and six months. The reason to have a probation period is twofold – it allows a period of time for both the employer and employee to determine whether the individual is right for the role and it focuses attention on ensuring the new employee has the training, support and guidance they need to perform in the role. The first few months in a role are crucial to the long term performance of an individual – this is the time when the underpinning knowledge required to do the role needs to be attained and where bad habits can develop if proper guidance is not provided. It is good practice to have a policy on managing probation in place.

Probation forms part of the contract of employment and continuing employment is usually subject to successful completion of probation, so the process needs to be managed properly for both the employer and employee.

When an offer of employment is made confirm the role is subject to a probation period and how long the period is. This should be stated in the contract of employment/written statement of particulars.

One-to-one’s should happen regularly with new starters to touch base on how things are going, check they are getting the support they need and to provide them with any feedback. Any concerns should be discussed straight away and not left until the formal probationary review.

**Formal Probation Reviews**

A formal review should take place halfway and two thirds of the way though the probationary period. Plan the meetings in advance so they are diarised. The purpose of the meeting is to:

* check on progress
* provide positive feedback
* identify any concerns about how the individual is settling in
* review and address any issues; providing support, guidance and training where needed

There should be no surprises for the individual when it comes to the end of their probation meeting and that the organisation is able to demonstrate that it has done everything it can to support them in their new role.

If things are not going as well as hoped at the first formal meeting, the individual should be advised where they need to improve if their probation is to be signed off at the end of the probationary period. They should also be advised at this point that their probation could be extended or their contract ended.

**Successful Probation Period**

At the final probationary review confirm that the probationary period has been successful, follow the review meeting with written confirmation. The new employee will by now be capable and competent to carry out the role, so it is important that they are set clear objectives at this stage to continue to develop in their role.

**Extending a Probationary Period**

If there are still concerns about suitability for the role, but it is believed that with further time and support these concerns can be addressed, consideration should be given to extending the probationary period. It is recommended that this is no less than one month and not more than 3 months.

Expectations of the employee during this extension and the support to be provided should be clearly outlined at this point. When extending probation a plan should be put in place for managing the extension period – regular progress review meetings should be arranged, any training needs met and additional support such as a mentor, work shadowing opportunities or additional checking of work put in place.

The decision to extend probation should be confirmed in writing, detailing the length of time the probation has been extended for, standards of performance expected and the support that will be provided. It should also make clear what will happen if the standards of performance are not met. Keep notes of the meeting outlining what was discussed.

**Unsuccessful Probationary Period**

If the employee has not met the required standards of performance, despite the support they have been given or offered during their probationary period, a decision can be taken to terminate the probationary period at this stage.

Hold a final meeting to explain that the performance has not reached the standards required and to inform the employee of decision to terminate. Give the employee notice that their employment will end, the amount of notice will depend on what was stated in the contract of employment, follow this exactly. The employee should be written to immediately confirming that they have not successfully completed their probation period and that their employment is being ended.