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**How to….. hold a probation review meeting**

A formal meeting should be held at the end of the probation period to review performance in the role so far.

In advance of the meeting, managers should:

* Review progress to date. Consider successes and areas for continued development. If necessary, consider what additional help you or the University needs to do to continue to help the member of staff develop.
* Check all essential / mandatory training has been completed.
* Review the objectives set at the beginning of the probation period, and assess how they have been completed.
* Seek feedback from colleagues where appropriate.

During the meeting managers should:

* Provide clear and concise feedback. Provide specific examples of good performance and highlight where the individual is doing well.
* Be positive – and honest.
* Ensure that it is a two-way discussion – see the views of the member of staff. Encourage an open dialogue. Check if the member of staff has any concerns or questions.
* Take notes of the discussion.
* Discuss any performance gaps / remaining development areas (these should not be a surprise to the member of staff if there has been regular dialogue throughout the probation period).
* Discus the future and set new objectives, including long term goals and personal development.

There are occasions where a probation period needs to be extended. This could be due to concerns with regard to performance in the role so far, or because it hasn’t been possible to properly assess performance (perhaps due to long term sickness for example).

*In the event that a probation period needs to be extended, managers may wish to take advice from their People & OD Partner in advance of the meeting.*