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Probationary Process - Employee (Probationer) Checklist

It is the responsibility of the probationer (the newly appointed or promoted employee) to ensure that each stage of the probationary process is completed on time, that employees are given honest and fair feedback on their performance and that appropriate supports are put in place to ensure that the employee is given every opportunity to achieve the required standard of performance.

CHECKLIST

- Understand that the process is an assessment of performance and determines future suitability in the role
- Understand and accept that the onus is on the probationer to meet performance standards and take responsibility for future development
- Prepare adequately for all probation meetings
- Fully engage with process and respond with feedback
- Ensure that the expectations and duties of the role are understood, and seek clarification when necessary
- Understand the overall work objectives/duties
- Jointly formulate, with the Line Manager, objectives / milestones for the full 12-month period
- Be self motivating and identify your development needs within the context of the role and how they may be addressed as early as possible
- Attend any training courses that have been identified as a requirement or support
- Take on board any suggested improvements and apply these improvement

How will HR support me as probationer?

- Ensuring that probation assessments are conducted at regular intervals

- Ensuring that probation assessments are conducted in a fair and transparent manner
- Ensure that the probationer is given sufficient opportunity to improve if performance issues are identified
- Ensuring that the final recommendation is communicated to the staff member with sufficient notice in advance of the end of the probation period
- Ensuring that any recommendations for failure / extension / pausing of probation are dealt with through the appropriate channels

Preparing for a Probation Assessment

These guidelines should help both managers and staff members to prepare for a probation assessment during the probationary period. A probation assessment is a planned meeting between a Line Manager and a staff member with set objectives:

- a) to review progress and priorities
- b) to acknowledge achievements
- c) to resolve issues, if necessary
- d) to discuss future priorities and development plans

The effectiveness of the discussion will be improved with appropriate advance preparation by both the manager and staff member. The following are recommended preparatory actions:

- Set up a mutually agreeable time and location for the meeting, ensuring no interruptions
- Review the job Description (both Line Manager & Probationer)
- Review documentation from previous performance conversation (if applicable) (Both Line Manager & Probationer)