



# PROBATIONARY PROCESS: Manager Checklist

Please check with your HR Business Partner for a comprehensive checklist of line manager duties.

## 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)