



University of Limerick

Guidelines for Managing Probation

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1.1 Manager's Responsibilities during Probation

The manager is responsible for helping the employee to establish their suitability for the job. Specifically, the manager must:

- Ensure that the individual is properly inducted into the department and has the necessary resources and support to fulfil the role
- Conduct regular probationary review meetings and ensure the probation assessment forms are returned to HR
- On commencement, outline the duties and responsibilities of the role and ensure that these are clearly understood
- Ensure the employee is fully informed of the University policies and procedures and is completing the training on Policies and Procedures / Mandatory Training (Six Months Checklist)
- Have the information needed to hand to conduct each meeting effectively
- Set and agree the objectives for the coming three months
- Provide honest and constructive feedback to the employee
- Be specific and clear about performance, both good and bad
- Listen to the employee's point of view and take account of any concerns they may have
- Provide appropriate support for the new employee
- Re-establish expectations on an ongoing basis
- Identify training needs

1.2 Employee's Responsibilities during Probation

The employee has a responsibility to:

- Ensure that the expectations and duties of the role are understood, and seek clarification when necessary
- Understand the overall work objectives/duties
- Ensure they read and understand the Policies and Procedures and complete the Mandatory Training as detailed in the "First Six Months –Checklist" (or version of this checklist that is current at the time)
- Identify and discuss any training needs they may have and agree how they may best be addressed

1.3 Frequency of Meetings during Probation

Meetings should take place at the following intervals:

- After three months' service
- After six months' service
- After nine months' service

1.4 The First Meeting

The first meeting during probation takes place after three months of service. This meeting provides the employee with an opportunity to further understand:

- The key aims of the department/unit
- The skills/competencies that are expected.
- The breadth of working relationships that will be necessary to fulfil the role.
- Any initial training needs
- Any other necessary resources

1.5 Subsequent Meetings

The probation meetings that occur after six months and nine months of service will cover:

- Progress with duties
- Discussion and resolution of any performance problems
- Clarification of expectations
- Identification of necessary support
- Agreement of action plan and next meeting, where applicable

Questions to Consider

Questions for the Manager to Consider

- What areas of strength have I seen since the last meeting?
- What progress has been made towards the agreed objectives?
- What are the development areas?
- What are the key priorities for the coming months?
- What support can I provide for development areas?

Questions for the Employee to Consider

- What progress have I made?
- What am I finding difficult?
- What do I find most interesting?
- What support do I need?
- What training needs do I have and what are the options for addressing these?

2.0 Managing Under-performance

Issues of under-performance should be discussed by the manager with the employee in the first instance and appropriate action agreed. If a problem persists, the manager, following consultation with Human Resources, should hold a meeting with the employee, outlining expectations and specifying where performance is unacceptable. Following this meeting, the manager should give the employee a written summary of the meeting, including a clear action plan with timescales. The consequences of failing to improve should be clearly outlined to the employee and documented appropriately.

2.1 Any queries relating to these guidelines should be referred to the Human Resources Division.