Probationary Period Development Plan

Team member name:	Role:
Line Manager:	Role:

Probationary Period Development Plans should:

- Be written with the input of both the team member and the line manager
- Have a reasonable review period that is long enough to allow for improvement, see additional guidance at the bottom of this page
- Clearly set out the performance objectives and agreed support/training, such as on the job training/coaching
- Be followed up by regular catch-up meetings throughout the review period for both the team member and line manager, to share their thoughts and observations on performance progress made and to check that any agreed support/training is working
- Be used for the whole of the performance improvement process

Team members should	• Actively take part in the writing of the Probationary Period Development Plan • Ask for any support they may need, and where applicable, talk through any health and/or disability concerns they may have. We are unable to consider adjustments or support if the individual doesn't let us know the background or what might be needed. • Take responsibility and ownership of their Probationary Period Development Plan, with the aim to meet the performance expectations outlined in the plan
Line managers should	• Explain the performance improvement process to the team member and reassure them that the aim of the process is to improve their performance • Ask the team member for their own evaluation of their performance • Involve team members in writing the objectives. However, ultimately the final say on what should be included sits with the line manager. • If a team member is not able to perform their duties as a result of a health condition and/or disability, explore reasonable adjustments and seek support from People Services • Set clear performance objectives, ensuring wherever possible that they are "SMART" (**S**pecific, **M**easurable, **A**chievable, **R**ealistic and **T**ime-bound) • Undertake regular catch-up meetings throughout the review period, either weekly or fortnightly (depending on length of review) and make note of any observations and/or feedback • Use this document throughout the performance improvement process, ensuring up to date copies are given to the team member at each stage

Setting a reasonable performance review period:

The agreed review period will vary depending on the individual's circumstances. As a guide, the review period should be between one to three months. It should be long enough to reasonably allow the team member to succeed and could depend on several factors, such as:

- The areas of performance that need improving
- Individual circumstances, such as health limitations

Objectives – These objectives should be used throughout the performance improvement process, and reviewed regularly in line with the schedule on Page 3

Improvement Objectives *What, specifically must the individual do to improve their performance to meet expected standards?*	**Success Criteria** *How will you know when the expected standards of performance have been met?*	**Additional Support Required** *What additional development or support does the individual require in order that they are able to achieve the expected standards?*	**Review Schedule** *When will progress against the improvement objective be reviewed? How will evidence of the progress be collected? Who will review progress?*	**Objective Outcome** *When will the final review of the plan be undertaken and by whom? What is the final outcome? What action will be taken if expected standards are not met?*

Probationary Period Development Plan

Plan start date:	
Plan end date:	(Between 4 and 8 weeks)

Catch-up Meetings *Please provide progress updates, observations and feedback*

Week 1	
Week 2	
Week 3	
Week 4	
Week 5	
Week 6	

Continue, as agreed, making sure notes are taken.

Final Review *Please provide observations and feedback, along with evidence to support the outcome*

Next Steps

If team member has made sufficient progress against all objectives: Inform the team member that they have successfully completed their Probationary Period Development Plan. To ensure that this improvement is sustained, the Probationary Period Development Plan will stay on their records for the remainder of their probationary period. If their performance becomes a concern within this period, their role may be terminated or their probationary period extended.

If team member has made some progress against the objectives: Consider extending the Probationary Period Development Plan, in conjunction with written extension of their probationary period, to allow for achievement of the outstanding objectives.

If team member has not achieved the objectives: Invite team member to a Formal Probationary Period Review meeting with at least 48 hours' notice. Please make them aware that an outcome of this meeting could be that their employment is terminated for failure of their probationary period.