**PROBATIONARY PERIOD REVIEW (EXAMPLE 2)**

The exact format and contents of this template will vary according to the organisation. Therefore, the following template can be used as guide and relevant changes made accordingly. However, any wording changes, other than those to insert a company or a person’s name(s), may change the context, meaning or purpose of the template and we recommend you receive advice from our Workplace Relations Consultants prior to making such changes.

## Contacting the Victorian Chamber of Commerce and Industry

The Victorian Chamber’s team of experienced workplace relations advisors can assist members with a range of employment, human resources and industrial relations issues.

Our team of consultants can also provide assistance to both members and non-members on a range of more complex matters for a fee-for-service. Our consultants can, among other things, provide training to employees, conduct investigations and provide representation at proceedings at the Fair Work Commission.

For assistance or more information, please contact the Workplace Relations Advice Line on (03) 8662 5222.

Disclaimer

The information contained in this document has been prepared by the Victorian Chamber of Commerce and Industry in this format for the convenience and benefit of its members and is provided as a source of information only. The Victorian Chamber does not accept responsibility for the accuracy of the information or its relevance or applicability in particular circumstances. The information does not constitute, and should not be relied on, as legal or other professional advice about the content and does not reflect the opinion of the Victorian Chamber, its employees or agents. The Victorian Chamber and its employees, officers, authors or agents expressly disclaim all and any liability to any person, whether a member of the Victorian Chamber or not, in respect of any action or decision to act or not act which is taken in reliance, whether partially or wholly, on the information in this communication. Without limiting the generality of this disclaimer, no responsibility or liability is accepted for any losses incurred in contract, tort, negligence, or any other cause of action, or for any consequential or other forms of loss. If you are uncertain about the application of this information in your own circumstances you should obtain specific advice.

## Probationary Period Review

It is recommended that this review is undertaken at the half way mark of the probationary period. The specific purpose of this discussion is to review experiences and performance to date, clarify expectations of the role and identify future performance objectives and development needs.

**Mid-Probationary Period Review Form**

|  |  |
| --- | --- |
| **Staff Name** |  |
| **Position** |  |
| **Manager** |  |
| **Commencement Date** |  |
| **Review Date** |  |

1. **Role Specific Performance**

Discussion regarding the staff member’s ability to perform the requirements of the position

***Discussion Prompts; what progress has the staff member made? Are there any highlights or areas of concern?***

|  |  |
| --- | --- |
| **Key responsibilities of the position**  (As outlined in the position description) | **Comments on performance** |
| 1. **E.g. Staff Management** |  |
|  |  |
|  |  |
|  |  |

1. **Core Competencies/Values**

Discussion regarding the contribution the staff member has made to the Company’s values or core competencies

|  |  |
| --- | --- |
| **Core Competencies** | **Comments** |
| 1. **E.g. Customer Service** |  |
| 1. **E.g. Teamwork** |  |
|  |  |
|  |  |

1. **Summary of Overall Performance to Date**

Overall comments regarding performance of the staff member to date. What are the identified strengths and areas for development?

1. **Performance Objectives**

Confirm performance objectives and measures, which will be reviewed in the next review period.

|  |  |  |
| --- | --- | --- |
| **Performance Objective** | **Performance Measure** | **Review notes** |
| **e.g. Business Development** | **e.g. Conduct 15 cold calls per week and generate at least two appointments per week as a result** |  |
|  |  |  |
|  |  |  |
|  |  |  |

1. **Learning and Development Plan**

Discuss and set a learning and development plan. Take into account areas for development highlighted above as well as set performance objectives that need to be met before the next review period.

|  |  |  |
| --- | --- | --- |
| **Learning and Development Objectives** | **Methods of Development**  Consider - Courses, seminars, reading, on-the job, coaching, mentoring. Which is the best option in this case? | **Completion Date** |
| **e.g. Business Development** | **e.g. Formal business development course**  **e.g. Coaching by BD Manager – To attend business development meetings with BD manager** | **e.g. June 2010** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

Signed  **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**\_

Staff Member Manager

Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_