## Probationary/REview/Trial period Process

Probation periods (and review and trial periods) provide an opportunity for the employee to demonstrate they can perform their duties satisfactorily given the necessary direction, support and feedback from their supervisor. A probation/review/trial period normally begins on the employee’s first day of work and ends after the timeframe specified in the applicable collective agreement or terms of employment.

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| **Employee Group** | **Probation Duration** | **Collective Agreement reference** |
| CUPE 917 | 3 months  (6 months in some roles) | [Article 16.06](https://www.uvic.ca/hr/assets/docs/labourrelations/collectiveagreements/cupe917-2022-2025-final-v3.pdf) – Probationary Period  Note: CUPE 917 uses a separate process and [separate form](https://www.uvic.ca/hr/assets/docs/hrc/performance-development/performance-planning-review/probationaryreviewform_CUPE_917.docx) |
| CUPE 951 | 3 months | [Article 16.07](https://www.uvic.ca/hr/assets/docs/labourrelations/collectiveagreements/951_ca_2022-2025.pdf) |
| Professional Employees Association (PEA) | 8 months | [Article 5.02](https://www.uvic.ca/hr/assets/docs/labourrelations/collectiveagreements/pea-ca-2022-to-2025-website-oct23.pdf) |
| Exempt Support (ES) | 3 months | Probationary/Qualifying Period – Terms and Conditions of Employment |
| Management Excluded (ME) | 12 months | Section 1.4 - Terms and Conditions of Employment |

## Three Phases in the Probationary Process Cycle

## probation forMs:

[Click Here](https://www.uvic.ca/hr/manager-support/onboarding/index.php) for the probation form.

## Prior to the first meeting

It is the supervisor’s responsibility to develop a probation/review/trial plan, including3 to 5 key responsibilities for the job based on the job/role description, with clear expectations and measures for each responsibility. Expectations should be aligned to the job description and be easily observed and measured by including indicators such as **quality**, **quantity**, **cost** and **time**.

## Guidelines for Meetings

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| Step 1 | **Probationary Planning Meeting** |

**Purpose:** The probationary planning meeting is part of the employee’s [orientation](https://www.uvic.ca/hr/manager-support/onboarding/index.php) to the university, the department and their job, and sets clear expectations for their role.

**Process:** The Probationary Planning meeting should happen within the first 10 days of employment and can be combined with other orientation activities.

Preparation: Using the relevant Probationary Period Form, the supervisor prepares a Performance Plan by identifying 3 to 5 job specific responsibilities and clarifying what is expected for each. The supervisor will also identify measures for each responsibility. Probationary or Trial expectations should be appropriate to the duration of the review period. **Note:** for positions with more than one incumbent, this section can be standard for all employees in the same job role.

### During the Meeting:

* Review the [Orientation Checklist](https://www.uvic.ca/hr/assets/docs/ld/EmpOrientToolkit-FINAL.pdf) with the employee including where to find information, resources and supports needed to be successful.
* Review the key job responsibilities and explain the expectations for each.
* Review the measures for each responsibility and how they will be observed and demonstrated.
* Develop a Learning Plan for the probation/trial/review period
* Invite questions and comments
* Schedule regular check-in meetings at the intervals identified for each employee group on the probation/trial review form.

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| Step 2 | **Regular Check-in Meetings** |

**Purpose:** The purpose of the check-in meetings is to provide opportunities for the employee to update their supervisor on their progress in relation to their orientation, responsibilities and expectations, and to receive feedback and coaching.

**Process:** Check-in meetings occur at the intervals identified on the form for each employee group and should be scheduled at the initial probationary planning meeting. Be sure to reschedule any meetings that are missed.

**Preparation:**To prepare for check-in meetings, the supervisor will review progress as well as any notes on coaching and feedback to date. The employee will note their progress on the probationary/trial review form before each check-in and the supervisor will document discussions on the form after each meeting.

**During the Meetings:**

* Continue to work through the remaining orientation checklist activities
* Discuss progress to date noting accomplishments and any challenges experienced
* Clarify where performance is meeting expectations and where improvement is still required
* Make any changes or updates to the expectations, training and orientation plan as needed
* Provide feedback, coaching and recognition
* Contact your HR Consultant for help with any issues or challenges that arise

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| Step 3 | **Final Probationary Review Meeting** |

**Purpose:** The purpose of the Final Probationary Review meeting is to review the achievement of expectations for the probationary/trial/review period. This is when the supervisor gives the final recommendation on the completion of the probationary period, which should not be a surprise.

**Process:**The date of the final probationary review should be booked at the initial probationary planning meeting and occur before the end of the probation period as defined in the appropriate collective agreement.

Preparation: Prior to the meeting, the supervisor should prepare by reviewing the probationary/trial review form and check-in notes to date. The supervisor should also document their perspective on the employee’s successes, strengths, and areas of challenge/development for the upcoming year. If any issues or challenges may impact the successful completion of the probationary period, the supervisor should contact their HR Consultant in advance for advice and assistance. The employee should prepare by completing the Final Probationary Review section of the form.

### During the meeting:

* Review progress and results, strengths, and any further development and support required.
* If the employee’s performance meets expectations, they have successfully completed the probationary period. This must be documented and signed and returned to Human Resources at the end of the probationary period. Transition to the [Performance and Development Cycle](https://www.uvic.ca/hr/manager-support/performance-coaching/development-cycle/index.php).
* If expectations have not been met, please contact your HR Consultant well in advance to discuss options, which **may** include an extension.
* If the employee’s performance has not met expectations, this must be documented, and the HR Consultant and Union representative (if applicable) will both need to be present at the final review meeting. Be sure to consult your HR Consultant in advance of the final meeting.

*\*Please submit completed probationary documents electronically to* [*hrassistant@uvic.ca*](mailto:hrassistant@uvic.ca)*.*