

FINAL PROBATIONARY REVIEW REPORT

This form is for use within Human Resources. Personal information collected on this form is confidential, and is used by Human Resources for the purpose of reviewing employee performance. Please note that Human Resources may disclose this information to relevant stakeholders as required.

Employee's Name:

Appointment Date:

Position:

Department:

Manager's Name :

Please return this report to your designated Human Resource Advisor in Human Resources (507 Robertson Hall) 6 months from the employee's appointment date. Please see accompanying "Probationary Review Report" email previously sent from your HR Advisor regarding specific due dates.

INSTRUCTIONS FOR COMPLETING THIS REPORT

OBJECTIVES OF PROBATIONARY REVIEW

- Assess suitability
- Facilitate employee development

1. As a starting point please read the pamphlet entitled **Working with Your New Employee** that you received from Human Resources at the time of hiring the new employee.
2. **Section 1: Responsibilities and Assessments:** The focus of this section is to assess the employee's performance against the job standards which you established when you reviewed the position description at your initial orientation meeting. When establishing job standards be sure to:
 - a. Explain the importance of the task
 - b. Set priorities
 - c. Make sure standards are realistic

Use the employee's job description to summarize and prioritize the responsibilities of the position. Provide an assessment of the employee's ability to perform each task or responsibility.

You might also want to include a list of tasks or responsibilities not yet performed for future follow up. Be specific.

For example:

Responsibilities
Problem Solving

Assessment

Recommends sound solutions by fully assessing and analyzing problems and by reviewing alternatives.

Word-processing

Set up and accuracy is impeccable. Needs to establish workload priorities.

Communicating with the Public

Knowledge of university regulations is average. Lacks ability to explain these in simple and easily understandable terms.

3. **Section 2: Areas Needing Development and Plans of Action:** This section is designed to help the manager and employee develops a plan for improving job performance. If the departmental standard for turn around time for word-processing is one day, and you find the employee does not meet this standard, then strategies for improving this should be stated in this section of the Final Probationary Review Form. One of the factors that might affect turn around time is lack of established priorities.

For example:

Areas Needing Development
Establishing workload priorities

Plan of Action

Set up procedure manual detailing departmental priorities for word-processing needs. Incumbent will register for "Time Management" seminar.

Ability to communicate regulations

In consultation with the employee the manager will designate a suitable co-worker to provide on-the-job coaching.

4. **Section 3: Additional Comments:** This section is to be used primarily for items not already covered. For example, the manager may wish to comment on the employee's attendance record, work behaviour, and so on.
5. **Section 4: Manager's Recommendation:** This section is to be completed towards the end of the probationary period and prior to the employee's confirmation in a continuing appointment.
6. Please note that the employee's signature is required on the Final Report. Please note that the manager's signature and the next report (ie. Director, Chair, Vice-President, Dean, President) signature are also required. This signifies that you have met with the employee to discuss the content of the report and to jointly develop a plan of action as required.
7. Once all parties have signed the document please distribute copies to the employee and to your designated HR Advisor in 507 Robertson Hall.
8. Please use a blank page for additional comments, as required.

Note: Should you require assistance in preparing for a performance review or in determining an appropriate training strategy, please feel free to contact your designated Human Resource Advisor. <http://www.carleton.ca/humanresources/whoswho/index.html>

Section 1: Responsibilities and Assessments

List; in order of priority the responsibilities of the position. For each task listed provide feedback on the employee's ability to perform the task.

RESPONSIBILITIES	ASSESSMENT

Section 2: Areas Needing Development and Plans of Action

List in order of priority the areas that need development. Recommend a plan of action for each, including training as appropriate.

AREAS NEEDING DEVELOPMENT	PLAN OF ACTION

Section 3: Additional Comments

Section #4: Manager's Confirmation

Do you wish to confirm the employee in a continuing/term appointment?

Yes No

If no, what do you recommend?

Manager's Signature

Date

Director's Signature

Date

Section #5: Employee's Sign-off

I have read and discussed this report with my manager.

Employee's Signature

Date

Once the employee has been recommended into the position and signed off by all parties, the employee will be considered officially confirmed into their position.

The personal information requested on this form is collected in accordance with Sections 38(2) and 41(1) of the Freedom of Information and Protection of Privacy Act (FIPPA), R.S.O. 1990, c.F.31 as amended. The information provided will not be used for any purposes other than those stated upon this form unless the applicant provides express written consent. Should you have any questions concerning your personal information, please contact the Assistant Director, Employee Services, FIPPA Representative for Human Resources, Room 507 Robertson Hall, (613)520-2600 x8635. Carleton University is fully compliant with FIPPA and endeavours at all times to treat your personal information in accordance with this law.