

# Quick Guide

## To managing probation

### Why it matters...

The probation period is an important time for ensuring that new employees are integrated well into their role and the University community.

All new employees must:

- Receive a thorough induction which ensures that they understand how the University works, the strategies that we all work to, and the University values.
- Have completed all [essential training](#) so that they understand core requirements for working here.
- Understand the expectations on them in their role and have a time to consider their development needs.

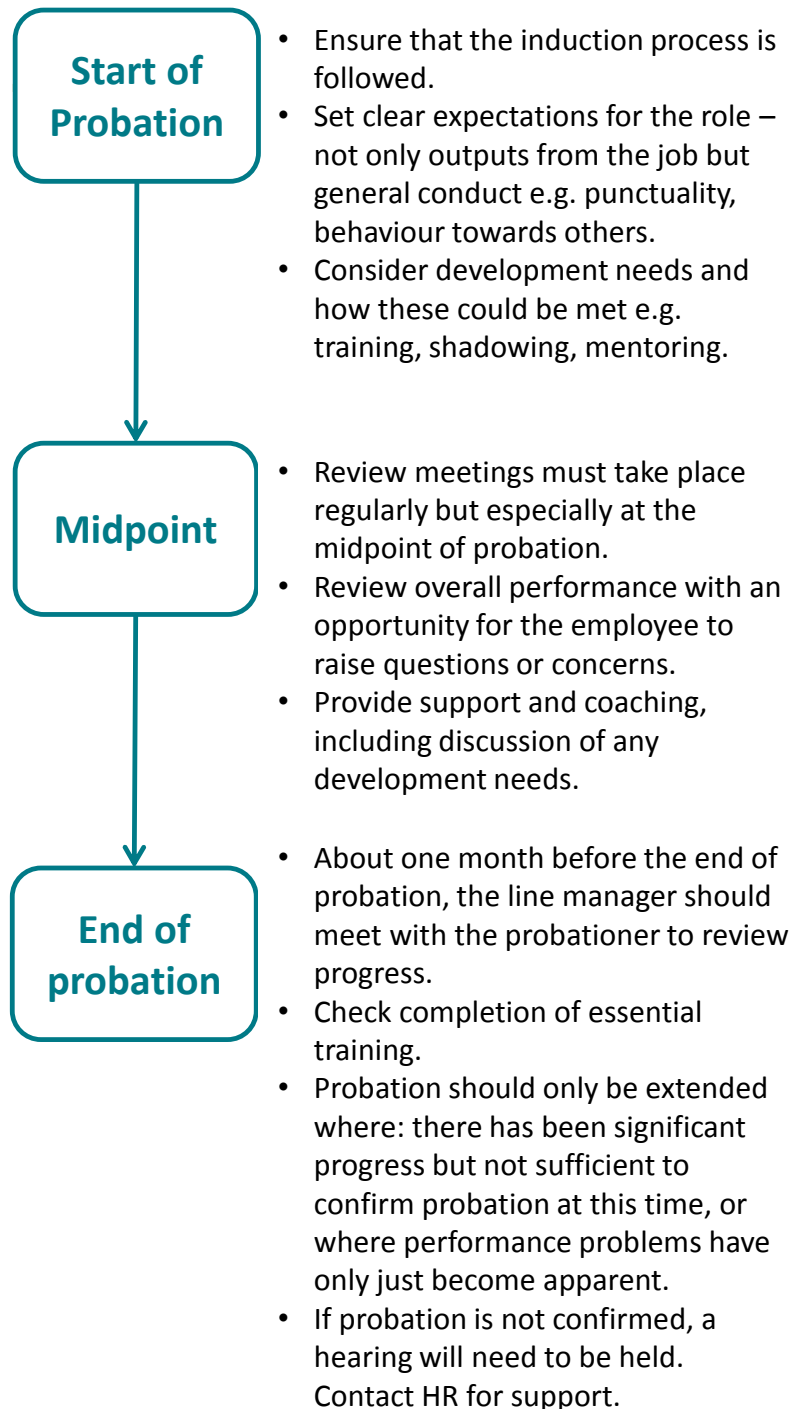
### What do I need to do?

The University induction process, including essential training, must be part of probation. [Welcome to Essex](#), includes a checklist for new employees and for line managers.

Set clear objectives on performance and reflection on development needs.

Regular review meetings should take place. This must include a meeting mid-way through probation to assess progress and at the end of the period to consider whether probation should be confirmed.

### How it works



## Discussing performance problems

There are four main aims where the meeting considers performance problems:

**To set the standard:** a clear indication of what is expected and an explanation of how they are not meeting this with examples.

**To seek an explanation:** why is the performance standard not being met: are there any training needs, health or personal problems that need to be addressed or taken into account?

**To require improvement:** to tell the employee what they need to do to make improvements and what support they will get. A period of 1-3 months should be sufficient to ascertain if the required improvements are being made and sustains but there will be a need to take into account how much of the probation period is left and ensure that they are given objectives which allow them to show improvement in this time e.g. it might be reasonable to expect them to produce research for a paper in the time available but not reasonable to expect them to have produced the paper.

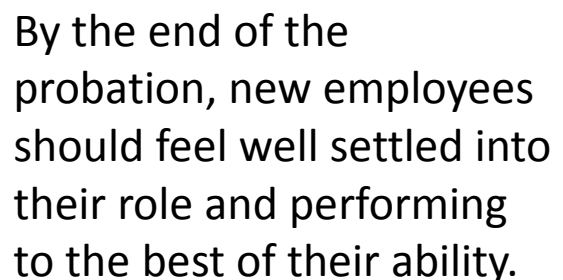
**To provide support:** to help identify and provide opportunities for relevant training or development that may help the employee in reaching the expected standard, and support to manage health or personal problems.

**To warn of the consequences:** to warn the employee that they may not pass their probation if they do not improve. This should be done even where the discussion has gone well.

## Probation periods

Probation periods range from:

- For permanent professional staff, twelve months for employees on grades 7-11 and six months for employees on grades 1-6.
- For fixed term professional staff, probation is half the duration of the contract to a maximum of six months where the contract is for 6 months or more; one month where the contract is for 3-6 months; no probation for contracts of less than 3 months.
- For fixed term academic staff, three months where the contract is 12 months or less; 6 months where the contract is for a period greater than 12 months.



By the end of the probation, new employees should feel well settled into their role and performing to the best of their ability.