**Record of First Probationary Review Meeting**

**LONDON’S GLOBAL UNIVERSITY**

**Confidential**

To completed at the first review meeting, held at the end of the first month of employment, before both parties sign it.

The employee must be given a copy for their own records.

|  |  |
| --- | --- |
| Name of employee |  |
| Department |  |
| Name of manager |  |
| Employee start date |  |
| Date of meeting |  |
| Name of Mentor allocated (if applicable):  |  |

|  |  |
| --- | --- |
| Has the employee completed their [mandatory training](https://www.ucl.ac.uk/human-resources/learning-development/mandatory-learning):**DAY ONE:*** [Local fire checklist TN086](https://www.ucl.ac.uk/estates/safety-ucl/fire-safety/fire-training)
* [Local safety induction](https://www.ucl.ac.uk/safety-services/local-safety-induction-checklist-managers)

The following [online mandatory training courses:](https://www.ucl.ac.uk/human-resources/organisational-development/training-inductions-and-leadership/mandatory-training)• UCL fire safety • UCL safety induction • Data Protection and Freedom of Information• Information Security Training with Cybsafe **WITHIN FIRST 6 WEEKS:*** Introduction to Equality, Diversity and Inclusion
* Change possible: Sustainable UCL
* Disclosing and Managing Conflict of Interest
* Prevent at UCL

Other [role specific training](https://www.ucl.ac.uk/human-resources/organisational-development/training-inductions-and-leadership/mandatory-training) appropriate to the role:**Appointment will not be confirmed unless all mandatory training has been completed.**  | **Date completed:** |
| Has the employee completed a [Display Screen Equipment (DSE) Assessment](https://www.ucl.ac.uk/safety-services/policies/2021/nov/display-screen-equipment-dse-assessment)? | **Date:** |

|  |
| --- |
| Is the probationer meeting the behavioural standards as outlined in the [Ways of Working](https://www.ucl.ac.uk/human-resources/policies-advice/ways-working): |
| Relationship with manager(s), colleagues and students (where applicable): |
| Attendance, punctuality, and overall conduct: |
| Objectives for the probationary period: |
| Any training/development requirements identified: |
| Any areas in which improved performance is required: |
| Support/training that will be provided to support the probationer in improving their performance: |
| Ask the probationer if they require any [reasonable adjustments](https://www.ucl.ac.uk/equality-diversity-inclusion/equality-areas-and-support/disability-equality/defining-disability-and-reasonable-adjustments) or accessibility support. If yes, consider scheduling another meeting to complete an [Agreement of Consistent Treatment](https://www.ucl.ac.uk/equality-diversity-inclusion/equality-areas-and-support-staff-students-and-managers/disability-equality/defining-disability-and). N.B. A Reasonable Adjustment is any step or steps UCL can reasonably take to prevent any provision, criterion or practice, or any physical feature of its premises, from putting a disabled person at a disadvantage in comparison with a non-disabled person.  |

**Manager’s overall assessment:**

**Progress satisfactory** [ ]

**Progress not satisfactory** [ ]

If progress is not satisfactory, please read [Appendix H](https://www.ucl.ac.uk/human-resources/sites/human_resources/files/ending_a_probationary_period_and_the_appeal_process.docx) in the policy and contact your HR Business Partner for further advice.

**Probationer’s comments:**

|  |  |
| --- | --- |
| Manager’s signature |  |
| Date |  |
| Probationer’s signature |  |
| Date |  |
| Head of department’s signature (where applicable) |  |
| Date |  |

Provide a copy of this completed form to the probationer.

Please ensure the date of the meeting is recorded in MyHR

**Record of Second Probationary Review Meeting**

**Confidential**

To be completed at the second review meeting, held at the mid-point of the probationary period (month 3/4/6/12/18 as appropriate) or, for inexperienced Lecturers, during the 12th month of the probationary period, before both parties sign it.

The employee must be given a copy for their own records.

|  |  |
| --- | --- |
| Name of employee |  |
| Department |  |
| Name of manager |  |
| Employee start date |  |
| Date of meeting |  |
| Name of Mentor allocated (if applicable):  |  |

|  |
| --- |
| Is the probationer meeting the behavioural standards for their grade as outlined in the [Ways of Working](https://www.ucl.ac.uk/human-resources/policies-advice/ways-working): |
| Relationship with manager(s), colleagues, and students (where applicable): |
| Attendance, punctuality, and overall conduct: |
| Is the probationer on-track to meet the probation objectives set at the first probation meeting?  |
| Any other training/development opportunities undertaken: |
| Any training/development requirements identified: |
| Any areas in which improved performance is required: |
| Support/training that will be provided to support the probationer in improving their performance: |
|

|  |
| --- |
| Ask the probationer if they require any [reasonable adjustments](https://www.ucl.ac.uk/equality-diversity-inclusion/equality-areas-and-support/disability-equality/defining-disability-and-reasonable-adjustments) or accessibility support. If yes, consider scheduling another meeting to complete an [Agreement of Consistent Treatment](https://www.ucl.ac.uk/equality-diversity-inclusion/equality-areas-and-support-staff-students-and-managers/disability-equality/defining-disability-and). N.B. A Reasonable Adjustment is any step or steps UCL can reasonably take to prevent any provision, criterion or practice, or any physical feature of its premises, from putting a disabled person at a disadvantage in comparison with a non-disabled person.  |

 |

**Manager’s overall assessment:**

**Progress satisfactory** [ ]

**Progress not satisfactory** [ ]

If progress is not satisfactory, please read [Appendix H](https://www.ucl.ac.uk/human-resources/sites/human_resources/files/ending_a_probationary_period_and_the_appeal_process.docx) in the policy and contact your HR Business Partner for further advice.

**Probationer’s comments:**

|  |  |
| --- | --- |
| Manager’s signature |  |
| Date |  |
| Probationer’s signature |  |
| Date |  |
| Head of Department’s signature (where applicable) |  |
| Date |  |

**Record of Final Probationary Review Meeting**

**Confidential**

To be completed at the final review meeting before the end of the probationary period.

Where performance has been unsatisfactory, the manager should contact their HR Business Partner for further advice before the meeting.
The employee must be given a copy for their own records.

|  |  |
| --- | --- |
| Name of employee |  |
| Department |  |
| Name of manager |  |
| Employee start date |  |
| Date of meeting |  |
| Name of Mentor allocated (if applicable):  |  |

|  |
| --- |
| Is the probationer meeting the behavioural standards for their grade as outlined in the [Ways of Working](https://www.ucl.ac.uk/human-resources/policies-advice/ways-working): |
| Relationship with manager(s), colleagues, and students (where applicable): |
| Attendance, punctuality, and overall conduct: |
| Has the probationer met their objectives? |
| Any other training/development opportunities undertaken: |
|

|  |
| --- |
| Ask the probationer if they require any [reasonable adjustments](https://www.ucl.ac.uk/equality-diversity-inclusion/equality-areas-and-support/disability-equality/defining-disability-and-reasonable-adjustments) or accessibility support. If yes, consider scheduling another meeting to complete an [Agreement of Consistent Treatment](https://www.ucl.ac.uk/equality-diversity-inclusion/equality-areas-and-support-staff-students-and-managers/disability-equality/defining-disability-and). N.B. A Reasonable Adjustment is any step or steps UCL can reasonably take to prevent any provision, criterion or practice, or any physical feature of its premises, from putting a disabled person at a disadvantage in comparison with a non-disabled person.  |

 |

**Manager’s overall assessment (*tick one box only*):**

1. **Probation completed satisfactorily** [ ]
2. **Probation period to be extended** [ ]
3. **Probation not completed and employment to end** [ ]

|  |
| --- |
| 1. **Probation completed satisfactorily**

Pass this form to the probationer to add any comments and then ensure it is signed by all parties.A copy of the completed form must be provided to the probationer and to HR Services, so a formal probation completion letter can be sent out. |
| 1. **Probation period to be extended**

Probation is to be extended by months, until .Reasons for the extension:Areas in which improved performance is required:Support/training that will be provided to support the probationer in improving their performance:Pass this form to the probationer to add any comments and then ensure it is signed by all parties. A copy of the completed form must be provided to the probationer and to HR Services, so the probationary end date can be updated. |
| **3. Probation not completed successfully, and a hearing to be arranged** Summary of discussion:Both parties should read [Appendix H](https://www.ucl.ac.uk/human-resources/sites/human_resources/files/ending_a_probationary_period_and_the_appeal_process.docx) to understand what will happen at the hearing. Pass this form to the probationer to add any comments and then ensure it is signed by all parties. A copy of the completed form must be provided to the probationer. |

**Probationer’s comments**

|  |  |
| --- | --- |
| Manager’s signature |  |
| Date |  |
| Probationer’s signature |  |
| Date |  |
| Head of Department’s signature |  |
| Date |  |

Provide a copy of this completed form to the probationer.
Record the date and outcome of the meeting in MyHR via Manager Self Service.

Forward a copy to HR Services if the probationer has completed their probation satisfactorily or if the probation period is to be extended.