



Personal and Confidential

Probationary Review and Plan Document

The UBC strategic plan, *Shaping UBC's Next Century*, sets out our collective vision, purpose, goals, and strategies for the years ahead. It guides our decisions and actions, inspiring the very best in our students, faculty, staff, alumni and partners. In addition, five enduring values underpin all our activities, interactions and decisions — excellence, integrity, respect, academic freedom and accountability.

The UBC Probationary Review and Plan Document is designed to:

- Assess, evaluate, and document the performance of the probationary employee.
- Provide an opportunity for the employee and supervisor to discuss progress.
- Create alignment between employee and organizational goals and to assist employee growth and development.
- Clearly articulate performance expectations to the employee.

Employee Information	
Employee Name:	
Employment Group:	
Department:	
Area/Division:	
Position Title:	
Position Level:	

Employment Information	dd-mm-yy
Initial Employment Date at UBC:	
Initial Employment Date in Department:	
Start Date in Current Position:	
Date of Last Review:	
Date of This Review:	



Prior to reviewing this document with the employee, begin by discussing the employees' self-reflection and self-assessment comments together.

Outline of Performance Rating Scale	
Exceeds Expectations	Performance consistently exceeds the essential requirements of the job. Performance competencies, in almost all areas, are well developed and consistently applied.
Meets Expectations	Performance consistently meets the essential requirements of the job. Performance competencies are developed in most areas and are consistently applied.
Development Needed	Performance sometimes meets the essential requirements of the job. Performance competencies are inconsistently applied.

PART A - PERFORMANCE ASSESSMENT

Provide the employee with feedback on the following core competencies. Please review the definition of each competency and provide detailed comments and specific supporting examples of how the employee demonstrates the competency and discuss together how they may further develop the competency.

The 'Comments/Examples' fields will expand as you type if additional space is required. If you prefer to print this document and complete it by hand, you can increase the size of the 'Comments/Examples' fields by clicking or tabbing inside the box and then pressing the 'ENTER' button on your keyboard until the field is the desired size.

Approach to Work
Consider the extent to which the employee demonstrates initiative, flexibility, adaptability, and resourcefulness while performing the duties of their position, and assess their ability to follow instructions. Consider the way the employee accepts new and varied work assignments and assumes responsibility for their completion.
<i>Comments/Examples (to be completed by Reviewer prior to meeting with Employee):</i>



Reviewer to list discussion notes from meeting with Employee here:

Exceeds Expectations	Meets Expectations	Development Needed
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Job Knowledge / Quality of Work

Consider the extent to which the employee understands and applies his/her knowledge of the techniques, methods, and skills involved in the position. Consider the extent to which the work is accurate, thorough, completed in a timely manner, and reflects follow-through to completion.

Note: If the employee is missing any of the required technical skills, accreditations or qualifications, please ensure this is addressed in the goal-setting section of this document.

Comments/Examples (to be completed by Reviewer prior to meeting with Employee):

Reviewer to list discussion notes from meeting with Employee here:

Exceeds Expectations	Meets Expectations	Development Needed
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Planning and Organization / Time Management

Consider the extent to which activities are planned, prioritized, and time organized to achieve goals and targets. Consider the amount of supervision required to achieve goals and targets. Consider the ability of the employee to adeptly manage competing tasks and to use his/her time efficiently and effectively.

Comments/Examples (to be completed by Reviewer prior to meeting with Employee):



Reviewer to list discussion notes from meeting with Employee here:

Exceeds Expectations	Meets Expectations	Development Needed
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Judgement / Decision Making

Consider the extent to which the employee demonstrates independent thinking and effective problem-solving skills. Consider the extent to which the employee makes appropriate decisions after adequately contemplating various available courses of action.

Comments/Examples (to be completed by Reviewer prior to meeting with Employee):

Reviewer to list discussion notes from meeting with Employee here:

Exceeds Expectations	Meets Expectations	Development Needed
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Communication / Interpersonal Skills

Consider the ability of the employee to express themselves clearly and professionally both verbally and in writing, as well as their ability to exercise tact and diplomacy. Consider the effectiveness of the employee's interactions with co-workers, supervisors, faculty, staff, students, and customers. Consider their commitment and contributions to team success while working in a group. Consider how well the employee gets along with and respects the rights of colleagues and displays a cooperative spirit.

Comments/Examples (to be completed by Reviewer prior to meeting with Employee):



Reviewer to list discussion notes from meeting with Employee here:

Exceeds Expectations	Meets Expectations	Development Needed
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Safety Awareness / Demonstration

Consider the work habits and attitude of the employee as they apply to working safely and the degree to which the employee complies with university safety rules. Consider the extent to which the employee understands and demonstrates proper safety practices, promotes safety, and shows awareness of the safety of others and accountability for personal safety.

Comments/Examples (to be completed by Reviewer prior to meeting with Employee):

Reviewer to list discussion notes from meeting with Employee here:

Exceeds Expectations	Meets Expectations	Development Needed
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

PERFORMANCE ASSESSMENT CONTINUED

Additional competency for employees with supervisory responsibilities

Supervisory / Leadership Skills

Consider the ability of the employee to effectively lead staff to accomplish work assignments. Consider the extent to which they establish challenging goals, accurately evaluate performance, match abilities with job requirements, establish effective working relationships, ensure a safe and positive working environment, and promote staff development and advancement. Consider the degree to which the employee utilizes resources (people, financial, equipment) economically and effectively.



<i>Comments/Examples (to be completed by Reviewer prior to meeting with Employee):</i>		
<i>Reviewer to list discussion notes from meeting with Employee here:</i>		
Exceeds Expectations	Meets Expectations	Development Needed
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

PART B - REVIEWER OVERALL COMMENTS

Please complete the following section prior to your meeting with the employee. Provide the employee with an overall summary of their performance. Highlight the employee’s strengths and development needs as they relate to performance. You may also comment on other areas of the employee’s performance that have not been addressed in this document.

<i>To be completed by Reviewer prior to meeting with Employee:</i>
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PART C - TRAINING PLAN / GOAL SETTING

During your meeting with the employee, discuss developmental goals/objectives and complete the following table. When developing these goals please refer to areas of performance where development is necessary. Please bring forward any developmental goals/objectives established at the previous probationary review (if applicable), and list as many goals as you feel are appropriate. You may attach another sheet if necessary.

Developmental Goals / Action Items	Achievement Plan	Check-In Dates
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Acknowledgments - Signatures	
Employee Name: <input type="checkbox"/> I would like to attach my 'Self-Assessment' to this document. <input type="checkbox"/> I will be providing my overall comments which I would like to be attached to this document.	Signature: * I have read and discussed this evaluation with my supervisor. My signature means that I have been advised on my performance and does not necessarily imply that I agree with the contents of this review.
Reviewer Name:	Signature:
Manager Name: (if different from Reviewer)	Signature:
Date of Next Review:	
Distribution: Original to be kept in the employee file, and a copy of this document should be provided to the employee. Please remember to attach the employee's 'Self-Assessment' and overall comments to this document (if applicable).	