

Template 11: Sample Probationary Performance Review Form

- To be completed by the Human Resources Committee of the Board for the Executive Director or by the Supervisor for staff positions.
- It is recommended that the review form be completed and discussed with the employee at the end of the first three (3) months and again prior to the end of the first six (6) months.
- These ratings will represent your evaluation of the employee's actual job performance during the probationary period. To help you make an objective evaluation, please consider the following suggestions:
 1. Review the employee's job description and performance expectations and base your ratings on the requirements of the job as described. The job description and performance expectations should be reviewed with the employee at the commencement of their position.
 2. Evaluate the employee's demonstrated and observable on-the-job performance.
 3. Consider one rating factor at a time so that your rating in one aspect will not influence your rating in another.
 4. Upon completion, check your ratings and comments. Discuss your ratings with the employee and encourage them to make comments.
 5. A copy of this form should be provided to the employee and the original should be retained in the employee's personal file.

Ratings:

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 but does not consistently meet the essential requirements of the job. Performance competencies are not consistently applied.
Unsatisfactory	Performance does not meet the expected standards and requirements of the job. Consistently performs below job requirements.

Employee Information

Employee Name:	
Position Title:	
Name of Individual Completing:	
Start Date:	
6-Month Probationary Period End Date:	
Date of Review:	

	INTERIM Progress and Performance Review (to be completed no later than halfway through the probationary period)
	FINAL Progress and Performance Review (to be completed before the end of the probationary period)
	OTHER Please specify:

PART A: PERFORMANCE ASSESSMENT

APPROACH TO WORK	Consider the extent to which the employee demonstrates initiative, flexibility, adaptability, and resourcefulness while fulfilling the duties of their position. Consider the way the employee accepts new and varied work assignments, assumes responsibility for their completion and makes suggestions for improvements.			
☐ Exceeds Expectations	☐ Meets Expectations	☐ Development Needed	☐ Unsatisfactory	
Comments/examples:				

JOB KNOWLEDGE/ QUALITY OF WORK	Consider the extent to which the employee demonstrates the required knowledge and skills to effectively carry out the position. Consider administrative, financial, promotional and marketing skills, or other relevant skills, as well as technical and program knowledge. If the employee is missing any of the required technical skills, accreditations or qualifications, ensure this is addressed in the goal-setting section of this document.			
☐ Exceeds Expectations	☐ Meets Expectations	☐ Development Needed	☐ Unsatisfactory	
Comments/examples:				

PLANNING AND ORGANIZATION/ TIME MANAGEMENT	Consider the extent to which activities are planned and prioritized and time is managed effectively to achieve goals and deliverables. Consider the accuracy, thoroughness and effectiveness of the work performed. Consider the volume produced, and how promptly assignments were completed.		
☐ Exceeds Expectations	☐ Meets Expectations	☐ Development Needed	☐ Unsatisfactory
Comments/examples:			

COMMUNICATION/ INTERPERSONAL SKILLS	Consider the ability of the employee to express themselves clearly, respectfully, and professionally both verbally and in writing. Consider their ability to exercise tact and diplomacy and to represent the organization effectively in interactions with board members, members, other stakeholders, and members of the public.		
☐ Exceeds Expectations	☐ Meets Expectations	☐ Development Needed	☐ Unsatisfactory
Comments/examples:			

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 considering available courses of action.		
☐ Exceeds Expectations	☐ Meets Expectations	☐ Development Needed	☐ Unsatisfactory
Comments/examples:			

PART B: TRAINING PLAN/GOAL SETTING

Please bring forward any developmental goals/objectives established at the previous probationary review (if applicable) and list as many goals as is appropriate.

Developmental Goals/ Action Items	Achievement Plan	Check-in dates

PART C: OVERALL ASSESSMENT

Rate the employee's total performance, taking into consideration the most important factors of the job. Provide the employee with an overall summary of their performance. Highlight the employee's strengths and development needs as they relate to performance.

☐ **Exceeds Expectations**
☐ **Meets Expectations**
☐ **Development Needed**
☐ **Unsatisfactory**

Comments/examples:

IF THIS IS THE FINAL REVIEW, PLEASE COMPLETE THE FOLLOWING:

- ☐ The performance of the employee met expectations during the performance period. The employee has successfully completed the probation and is confirmed as a regular employee.
- ☐ The employee has not yet demonstrated the ability to meet the performance expectations. An extension of the probationary period has been requested.
- ☐ The performance of the employee did NOT meet expectations during the probationary period.

REVIEWER'S SIGNATURE:

DATE:

EMPLOYEE'S COMMENTS (OPTIONAL)

EMPLOYEE'S SIGNATURE:

DATE:

Please retain a copy of this form for each of the Employee and the Reviewer